

branding   new products   ideation   qualitative



**the wright group**

# **Carlsbad Positioning Exploratory**

Prepared for CTBID

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**Caveat:** Intercept and in-depth interviews are a rich source of qualitative material. Although participants were drawn from the population from whom we seek insights and to whom we wish to appeal, they were not chosen to represent the population statistically. No statistical inferences should be drawn from the findings in this report.

# Objectives

## **At this work session, our objectives are to:**

- Understand research findings
- Agree on positioning recommendations and next steps
- Identify how Carlsbad might evolve to tangibly deliver on these positioning directions
- Be motivated to make these recommendations a part of future programs

# Methodology

**We conducted 64 intercept interviews (34 with Carlsbad Tourists, 30 with Prospects) and 14 in-depths**

**Our Research Participants were from 23 states, 58 cities, and 1 international**

- Arizona: Cave Creek, Chandler, Phoenix, Scottsdale, Tempe, Tucson
- California/Northern: Bakersfield, Berkeley, Concord, Fremont, Fresno, Lake County, Hillsborough, Novato, Petaluma, Sacramento, San Jose, San Ramon
- California/Southern: Chatsworth, Corona, Encino, Los Angeles, Pasadena, Riverside, San Bernardino, San Jacinto, Thousand Oaks
- Connecticut: Norwalk
- Colorado: Boulder
- DC: Washington
- Florida: Saratoga
- Georgia: Atlanta
- Illinois: Chicago, Quad Cities
- Maryland: Baltimore
- Massachusetts: Boston
- Michigan: Grand Rapids
- Minnesota: Minneapolis
- Missouri: St. Louis
- Nevada: Las Vegas
- New Hampshire: Canterbury
- New Jersey: Marlton, Raritan
- New Mexico: Albuquerque
- New York: Glen Cove, New York City
- Ohio: Akron, Cleveland
- Tennessee: Franklin, Knoxville, Nashville
- Texas: Arlington, Dallas, Richland Hills
- Washington: Kirkland, Seattle, Spokane
- Wisconsin: Kenosha, Madison
- Mexico City

# Methodology

## All Participants

- Visiting Carlsbad or competitive destination from out-of-town (all traveled over 50 miles)
- Staying overnight with a mix of luxury, full service, and limited service hotels. No condo, time-share or campground visitors
- All on a leisure trip including a few who have extended a business trip
- Over 1/2 traveling with kids

## Interview Locations

- 18 different locations:
- Carlsbad: The Village, along the sea wall, in 4 different hotel properties, Legoland, the outlet mall
- Del Mar, by the beach, in Jake's Restaurant
- Coronado: Hotel del Coronado, on the beach, in town
- Laguna Beach: outside the Visitor Center, in the park by the beach
- La Jolla Cove: around the shops, in a coffee house, by the water

# Carlsbad Brand

**Physical Attributes**

**How It Makes You Feel**

**Image**

**Personality**

## Carlsbad Brand

### Carlsbad's Key Physical Attributes are:

**Legoland**

**Destination Hotels**

**Beautiful Beach**

**Shopping Outlets**

**Great Weather**

**Quaint Village**

**Nice People**

**Not Crowded**

**Clean**

**Walkable**



*"Today was the best day I've ever had.  
Going to Legoland was a dream come  
true"*

11-year-old Gregory, Marybeth, NY

### Legoland is a primary reason people come

- It has a national profile and appears to drive a great deal of tourist traffic



## Carlsbad Brand

**Destination hotels: there are a number of hotels that are so appealing they are a main draw**

**Both high-end luxury choices ..... and more mainstream hotels**



*“It’s the best hotel I’ve ever been in.... It has good service so my parents don’t get upset”*

Matt and Steven, Boulder, CO



*“We’ve come back to the Four Seasons eight years running”*

Samuel Family, Washington DC



Don and Ellen come to the Best Western Beach View Lodge from Tucson every year

They love Carlsbad, but it is this specific property, its price, location and view, that make them loyal



# Carlsbad Brand

## The beach and all the associated beach activities are a strong draw

*“It’s mostly about the beach”*

*“My son loves the surf camp”*

## The shopping outlets add greatly to the appeal, especially for women

*“I about lost my mind when I saw the shopping outlets here”*

## Tourists enjoy the weather, especially those coming from very hot climates

*“It’s better than 113 degrees”*



*“Carlsbad has the world’s best weather. Phoenix, Palm Springs and Vegas all have ugly weather – it’s sticky and sweltering”*

Jim, LA

# Carlsbad Brand

## Visitors enjoy the quaint village area and its walkability

*“We love the Village. We walk everywhere here. It’s great for the waistline”*

*“It has an older village feeling”*

*“The village, the kite flyer, the bird keeper and the juggler are all unique”*

*“It’s a walking town”*

## Tourists find the people of Carlsbad very nice and the town uncrowded

## The ‘not crowded’ is an important unique-to-Carlsbad attribute

*“Not too touristy. Full of families and retirees”*

*“It’s not too crowded”*

*“Carlsbad has fewer tourists than La Jolla, and it’s quieter”*



*“Carlsbad is like heaven. It’s got the ocean and you can walk everywhere. I’ve probably been here 60 times”*

Sybil, San Bernardino, CA

## Carlsbad Brand

**Carlsbad Makes People Feel:** Happy, Relaxed, Calm, Serene, Safe, In Control, Comfortable, At Home, You Fit In, Alive, Healthy

### As a Carlsbad tourist you feel happy

*“It’s not hard to find people having a good time”*

### The mood is relaxed, calm and serene

*“We come for a week every year. I like to come to think and read and hang out in Carlsbad”*

*“Clean and not a lot of riff raff. It’s a different vibe here. Calming and relaxing”*

*“Other beaches have more action, more going on”*

*“It gives me a feeling of peace and contentment. And it’s more relaxing than San Diego”*

*“Calm. Not the hubbub you get at other resorts”*

*“We just spend time with each other. It’s a chance to set your priorities. It’s refreshing. I find I’m reflective here and I learn to appreciate my wife”*

*“It is almost hypnotizing. ...Time to be reflective, get your priorities straight. Value your family and friends more”*



*“Carlsbad is a relaxing place to see the sunset”*

Heather, San Jacinto, CA

# Carlsbad Brand

## The town feels safe and visitors therefore feel in control and comfortable

*“My granddaughters who are 13 and 18 can walk around”*

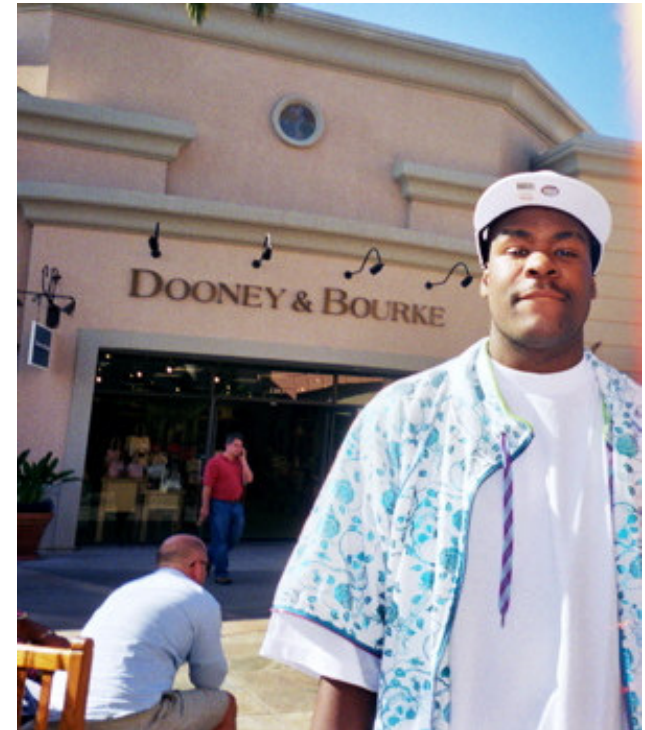
*“It’s safe to walk by yourself”*

*“You can’t tell the difference between a tourist and a local. Everyone seems comfortable here”*

*“It’s a small town, I can get to know it, I can handle it, I’m in control and I know what to expect”*

*“It’s amazing to be able to stroll safely at night”*

## This is a town that you can feel at home in, like you fit in



*“It feels like home and everyone is really nice”*

Jerome, Atlanta

## Carlsbad Brand

**It is also an active town with people out and about, so you feel alive and healthy**

*“I like that everyone is out and active. It feels very alive”*



*“The seawall walk I do everyday”*

# Carlsbad Brand

**Carlsbad's Image is: Casual, Family-Oriented, Wholesome, Middle Class, Small Town, Active, Outdoorsy**

**This is a laid-back place that feels casual**

*"Not too touristy"*

*"I don't feel people are trying to push me or hurry me up"*

**Carlsbad is family-oriented**

*"It's for people enjoying their families"*

*"Way better than Florida, not as many old people"*

**This is linked to a wholesome feeling**

*"Not rock 'n roll"*

*"It's a family audience. There's no party atmosphere"*

*"Carlsbad is for somebody out of that party stage"*

*"At 10 o'clock, I like quiet"*



*"No wild party types, it's more family-oriented"*

Lisa, Pasadena, CA



# Carlsbad Brand

## Carlsbad has a small town, middle class feel

*“It just fits us. La Jolla is upscale. Del Mar is even more upscale. Carlsbad is middle class”*

*“You don’t need to be really wealthy. Carlsbad is more affordable”*

## Carlsbad is relaxed, but it’s not sleepy

## People are enjoying the outdoors, so it feels active

*“We’ve spent more time outside than I expected”*



This family from Cleveland will come again because of all the available activities, including surfing for their son



## Carlsbad Brand

**Carlsbad's Personality is: Friendly, Welcome, Laid Back, Not Snotty, Not Stuffy, Fun**

**Carlsbad tourists ascribe a different mood to Carlsbad than nearby destinations**

*"Orange County is snotty"*

*"Classy people, but not stuffy like La Jolla"*

*"More laid back than San Diego"*

*"La Jolla is snotty. Carlsbad is laid back, casual and fun"*



*"Carlsbad is like a Dolphin:  
Friendly and happy"*



*"Carlsbad is like Julia Roberts:  
Friendly, down-to-earth and  
family-oriented"*



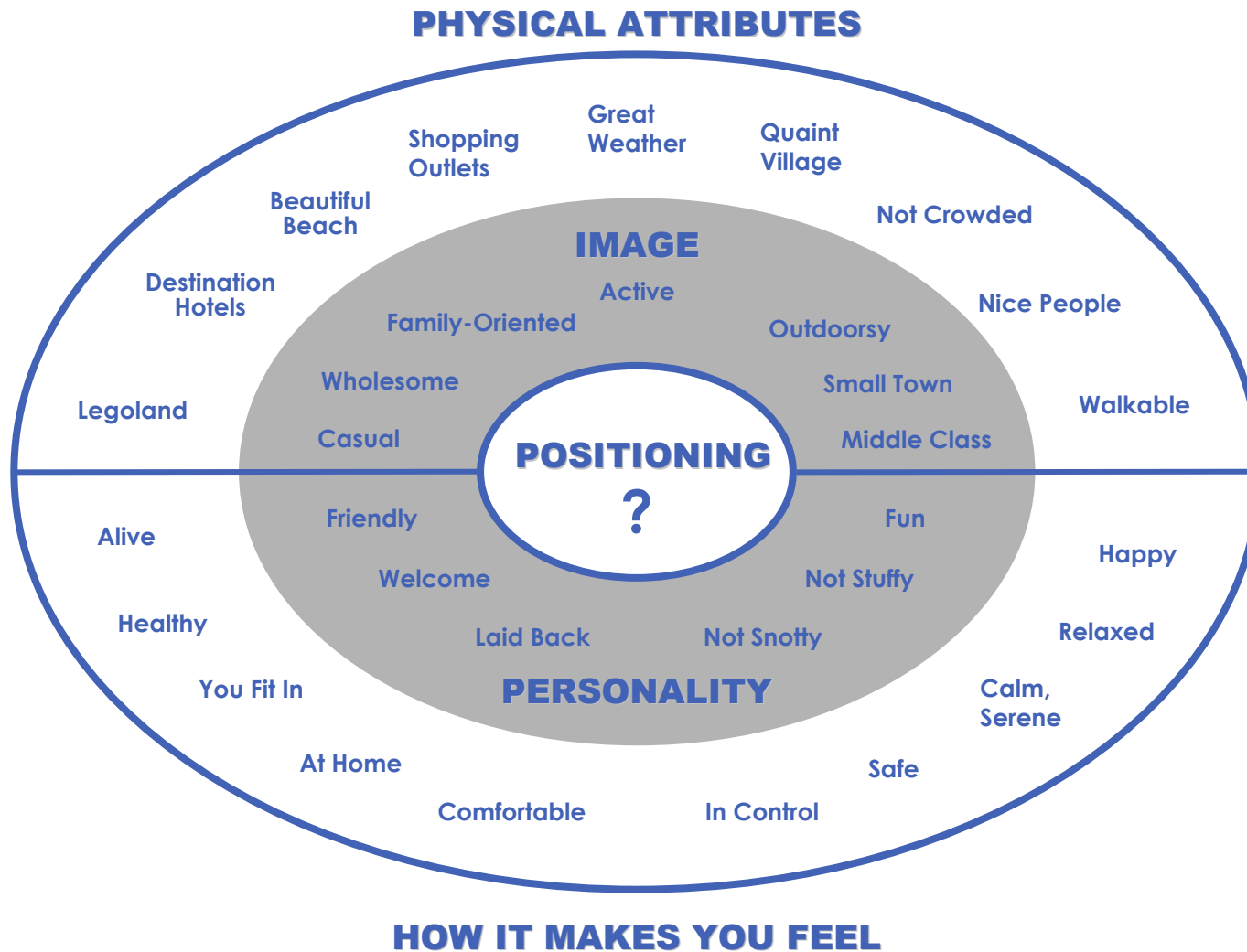
*"Carlsbad is happy, fun and  
free-spirited"*

Frank and kids, Cave Creek, AZ

# Carlsbad Brand

## Carlsbad is a unique and very meaningful brand

- We need to identify a positioning message that leverages it



# Carlsbad Positioning

**Challenges**

**Criterion**

**Recommendations**

# Carlsbad Positioning: Challenges

**While Carlsbad is a meaningful and promising brand, there are 5 major challenges to marketing it successfully**

- 1: Lack of awareness**
- 2: We are competing against some very established nearby destinations**
- 3: The name is not descriptive**
- 4: Leveraging the visitors to Legoland**
- 5: Establishing Carlsbad as a distinct destination**

# Carlsbad Positioning: Challenges

## Challenge #1: Lack of awareness

**Most interviewees in Coronado, Laguna Beach, La Jolla and Del Mar had never heard of Carlsbad**

*“La Jolla is fancy and nice. I don’t know anything about Carlsbad”*

**Indeed, some interviews with visitors at Legoland and with guests staying in Carlsbad hotels revealed they were not aware they were in Carlsbad**



*“I’ve never heard of Carlsbad”*

Donna and Kathy, Raritan, NJ



Staying in San Diego and visiting Legoland -- they didn’t know they were in Carlsbad

The Gonzales Family, Las Vegas



Staying at the Motel 6 in Carlsbad and visiting Legoland with her son and 2 grandkids. She has never heard of Carlsbad and didn’t know she was in it; she thought she was in San Diego

Cindy, Phoenix

## Carlsbad Positioning: Challenges

**Challenge #2:** We are competing against some very established nearby destinations

**Laguna Beach, Coronado, La Jolla, Del Mar, Solana Beach, and so forth represent tough competition**

*“Laguna has good art shows. It’s very artistic”*

*“La Jolla is very wealthy and upscale”*

*“Del Mar is beautiful, it’s fabulous”*



*“Del Coronado is one of the places you come to. The history of the hotel and the beach”*

Becky, Erin and Carolyn, Knoxville, TN

## **Carlsbad Positioning: Challenges**

### **Challenge #3: The name is not descriptive**

**Carlsbad doesn't sounds like a California beach town**

**There is some confusion with Carlsbad Caverns**

*“Is Carlsbad where the caverns are?”*

**It would be advantageous to designate an area in Carlsbad as ‘Carlsbad Beach’**



## Carlsbad Positioning: Challenges

### Challenge #4: Leveraging the visitors to Legoland

For many visitors, their visit to Carlsbad is focused exclusively on Legoland

**Legoland visitors, for the most part, don't assume Carlsbad has a beach**

- One family at Legoland reported trying to find their way to the beach, but they couldn't find any signs to it

**Carlsbad needs to leverage the many visitors to Legoland**

- It is in Legoland's interest to let its visitors know about Carlsbad's beach and village areas
- Tourists are more likely to visit longer and more frequently if they know that other activities and places await them nearby



*"I just know about Legoland, I don't know of anything else to do in Carlsbad"*

Keith and Clay, Grand Rapids, MI



*"I didn't know there was a beach near Legoland"*

Lenore

# Carlsbad Positioning: Challenges

## Challenge #5: Establishing Carlsbad as a distinct destination

**Some people knew they were in Carlsbad, but they just considered it part of San Diego**

- Even repeat visitors may not acknowledge Carlsbad as a distinct destination
  - Rather, it is relegated to a vague 'North San Diego' regionalism



Vanessa sees Carlsbad as part of San Diego:

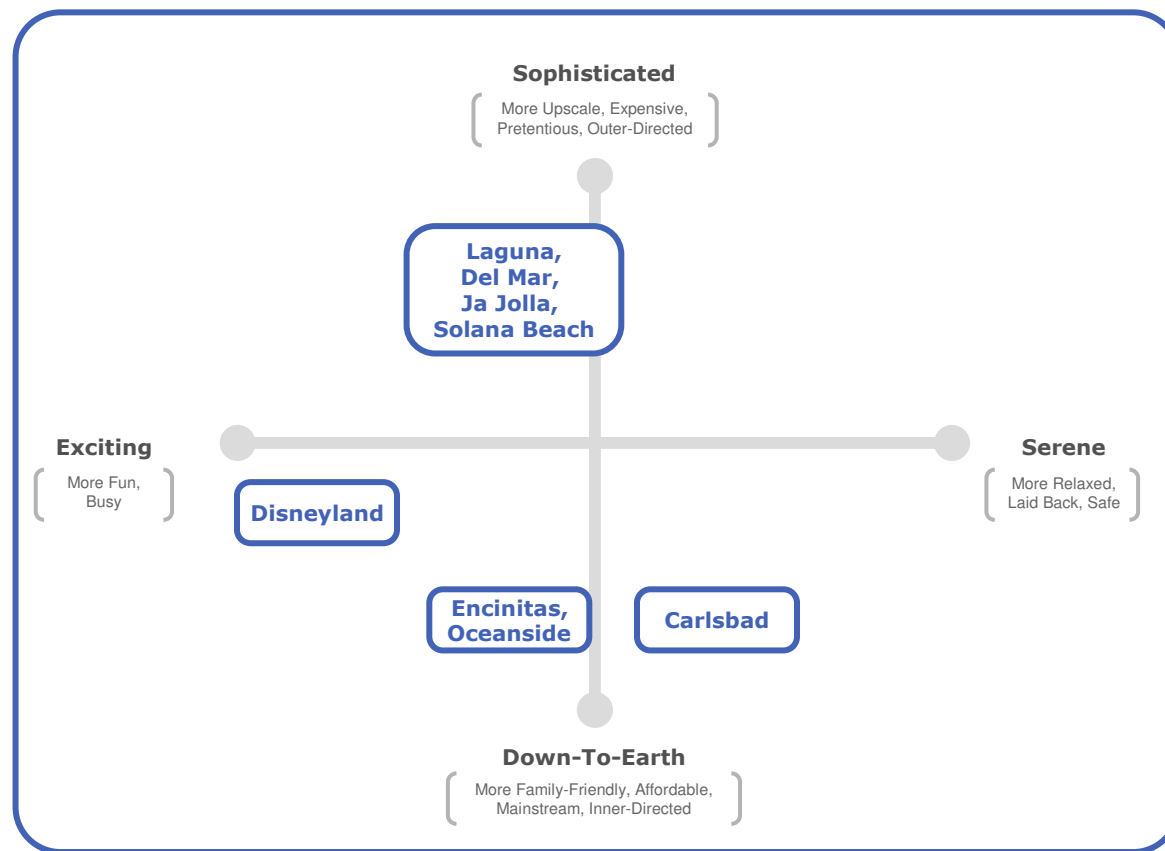
*"It's more relaxed and not as busy as San Diego ... I tell my friends I'm going to San Diego. I just consider it North San Diego"*

Vanessa and Alexander, Lake County, California

# Carlsbad Positioning: Challenges

**While these are 5 tough challenges, our brand is already in a distinct place compared to other destinations**

- We have the 'Serene' and 'Down-To-Earth' quadrant all to ourselves



# Carlsbad Positioning

**Criterion**

**Recommendations**

# Carlsbad Positioning: Criterion

## Our positioning must:

<b>Differentiate</b>	<ul style="list-style-type: none"><li>• Leverage our unique perceptual map placement</li><li>• Distinguish Carlsbad from other locations</li><li>• Establish Carlsbad as a destination</li></ul>
<b>Fit</b>	<ul style="list-style-type: none"><li>• Feel authentic to Carlsbad and fit with Carlsbad better than other destinations</li></ul>
<b>Appeal</b>	<ul style="list-style-type: none"><li>• Compel tourists to want to come</li></ul>
<b>Last</b>	<ul style="list-style-type: none"><li>• Be an idea that will endure over a number of years</li><li>• Carlsbad must commit to this idea and work to 'own' it over time</li></ul>
<b>Breakthrough</b>	<ul style="list-style-type: none"><li>• Have sufficient impact to be heard</li><li>• Sounds newsworthy and introductory</li></ul>

# Carlsbad Positioning: Recommendations

## **We recommend pursuing and testing 3 ideas:**

1. A Friendly Place
2. True Escape/Relaxation
3. Southern California, The Way It Should Be

## **These positionings all leverage Carlsbad's current Serene and Down-To-Earth position**

### **All exploit many of Carlsbad's attributes**

- Safe, comfortable, at home feelings and a wholesome, small town image are an intrinsic part of these ideas
- 'Not crowded' is also key and very believable given lack of Carlsbad awareness

### **All present Carlsbad as unpretentious**

- This effectively repositions other destinations as being showy and ostentatious

# Carlsbad Positioning: Recommendations

**All 3 recommended positionings will communicate family friendly without explicitly stating it**

**All can be seen as an antidote to modern life: a way to get away from the daily grind**

**All should sound newsworthy, because of Carlsbad's low awareness**

**Note: Avoiding driving is an issue for tourists**

*"There is very little information on getting around here. I don't want to rent a car and drive. Everyone has heard about California traffic."*

San Diego visitor from Tennessee



To get to Legoland from their San Diego hotel, these New Hampshire visitors took a cab to the Coaster, rode the Coaster to Carlsbad and then took a bus close to Legoland

*"We didn't rent a car. San Diego is too oriented to driving"*

Grandparents and grandkids,  
Canterbury, New Hampshire



## **Carlsbad Positioning: Recommendation #1: A Friendly Place**

### **Welcome To Carlsbad, The Friendliest Beach Town In California**

**You notice little things when you arrive in a new place – the atmosphere, the mood, the welcome. Those little things can make or break a vacation.**

**You're going to feel the welcome from Carlsbad. Thirty miles north of San Diego, this is a warm and beautiful beach town filled with friendly people, people who seem happy to meet you and who are eager to share their town with you. Blessed with seven miles of sunny beaches, Carlsbad is a great place to be, and both the locals and the visitors seem to share that feeling. People aren't in a hurry to get from here to there: they might walk or bike to the village center for a coffee, or meet at the seawall to watch the sun set. Of course, with this much room and natural wealth, there's plenty to do in Carlsbad: those uncrowded beaches could be just the place to learn to surf, or to go for a jog and breathe the fresh air coming in off the ocean; and Legoland and Premium Outlet shopping are right here, too.**

**Carlsbad is ready to welcome you with a smile.**

## **Carlsbad Positioning: Recommendation #2: True Escape/Relaxation**

### **Discover Carlsbad's Genuine Relaxation**

**Some vacations can be overly stressful. You feel you're competing against other visitors as you jostle in long lines at the must-see attractions and restaurants.**

**Carlsbad is a place to kick back and enjoy yourself, a place where you really can leave the daily grind and your troubles behind. Sure, there are world-class attractions like Legoland and Southern California's sun, and seven miles of beaches and abundant nature trails right here, but Carlsbad offers something more: genuine, small-town charm that relaxes visitors and locals alike. Carlsbad is a quiet and unpretentious beach town, 30 miles north of San Diego. It's the kind of getaway place that people dream of: a town for walking and cycling, for taking in the sunset on the seawall or chilling at a sidewalk cafe in the village.**

**Discover Carlsbad, and take it easy.**

## **Carlsbad Positioning: Recommendation #3 Southern California, The Way It Should Be**

### **Discover Carlsbad: It's Southern California, The Way It Should Be**

**Imagine your favorite Southern California beach town as it was before the crowds, strip malls and smog.**

**Carlsbad is as beautiful today as the Southern California of your memories or imagination. You'll find perfect year-round weather and seven miles of pristine beaches in Carlsbad. There isn't much in the way of big-city bustle here: people would rather park their cars and enjoy the day on foot, strolling along the shore or ambling through the quaint mom-and-pop shops in the village. There's room to breathe here, so you don't feel crowded or hurried -- Carlsbad pioneered the open space movement. The town has seen some terrific enhancements in the past few decades, too: a Premium Outlet Mall and Legoland have chosen to put down roots in Carlsbad. Isn't it good to know that just 30 miles up the coast from San Diego there's still an authentic, easy-going beach town?**

**Carlsbad reminds us what a beach town should be.**

## **Carlsbad Positioning: Alternative Recommendation: North County Regional**

**An alternative strategy is to join with other North County Beach towns, leverage the beauty and amenities of the area, and position Carlsbad as one of the appealing towns in the region**

- Given Carlsbad's low awareness and budget constraints, this is a viable option

### **Discover The San Diego Beach Towns For A More Relaxed Southern California Experience**

**In the beach and foothill towns north of San Diego, you'll find sunny days and balmy nights, broad white-sand beaches and rolling golden hills, and the easy-going tempo and laid-back style we're famous for. This is open country, ripe for exploration, with world-class resorts and spectacular scenery. Stroll the boardwalk in Oceanside, cycle along Carlsbad's seawall, or join a pickup volleyball game in Solana Beach. Taste your way through the wineries around Escondido, or watch the ponies run at the Del Mar Fairgrounds.**

**The San Diego Beach Towns are the Southern California you've been looking for.**

## Town Improvements

# Town Improvements

## As expected, the typical answer is: don't change it

- Carlsbad visitors are happy the way it is
- They want to ensure it does not get busier or more stressful

## Other suggestions include:

- Better beach signage
- More parking in the village area and at the beach
- Remodel Albertsons
- Dog control
- Sidewalks more conducive to bikes
- An RV park



*“Carlsbad is a neat little town. I don’t want it to change. I like it the way it is”*

Miguel, Boulder, CO

# Town Improvements

## The Wright Group suggestions include:

### Create improvements that drive home Carlsbad's new positioning

- Eg. Old fashioned candy/ice cream store; new architecture in the Village should reinforce quaint character, quaint signage to beach

### Identify another attraction that complements Legoland, that appeals to families with bright kids

- Ridemakerz, the new retail store where kids design their toy vehicles (Build-A-Bear Workshop backing)
- Beach ecology/marine/wilderness activities
- Fun educational tour of the water/mineral springs
- Live kid-oriented theater in the evening
- If Legoland's appeal is more boys, create a girl attraction: The Barbie Museum

### If tourists come for 2 key attractions, they need to stay over in Carlsbad and are more likely to make it their primary destination



## Town Improvements

**Continue to improve Carlsbad's websites, include live web cams of the beach etc., and make sure hotels carry other Carlsbad activity suggestions**

*"In the hotel [Hilton Garden Inn] there's lots on San Diego attractions, not Carlsbad"*

*"Not a lot of stuff on Carlsbad, even online"*

**Legoland website should link to Carlsbad and vice versa**

**Develop other attractions that are unique to Carlsbad**

- Callaway Golf Club Factory Tours, custom clubs purchasing?

**Create a booklet-sized visitor guide that is portable**

- One family in Laguna were carrying a Laguna Beach Visitor Guide
- Its booklet size appears conducive to bringing with you

## **Overall Conclusions and Recommendations**

# Overall Conclusions And Recommendations

**Carlsbad is a unique, if under-publicized, brand**

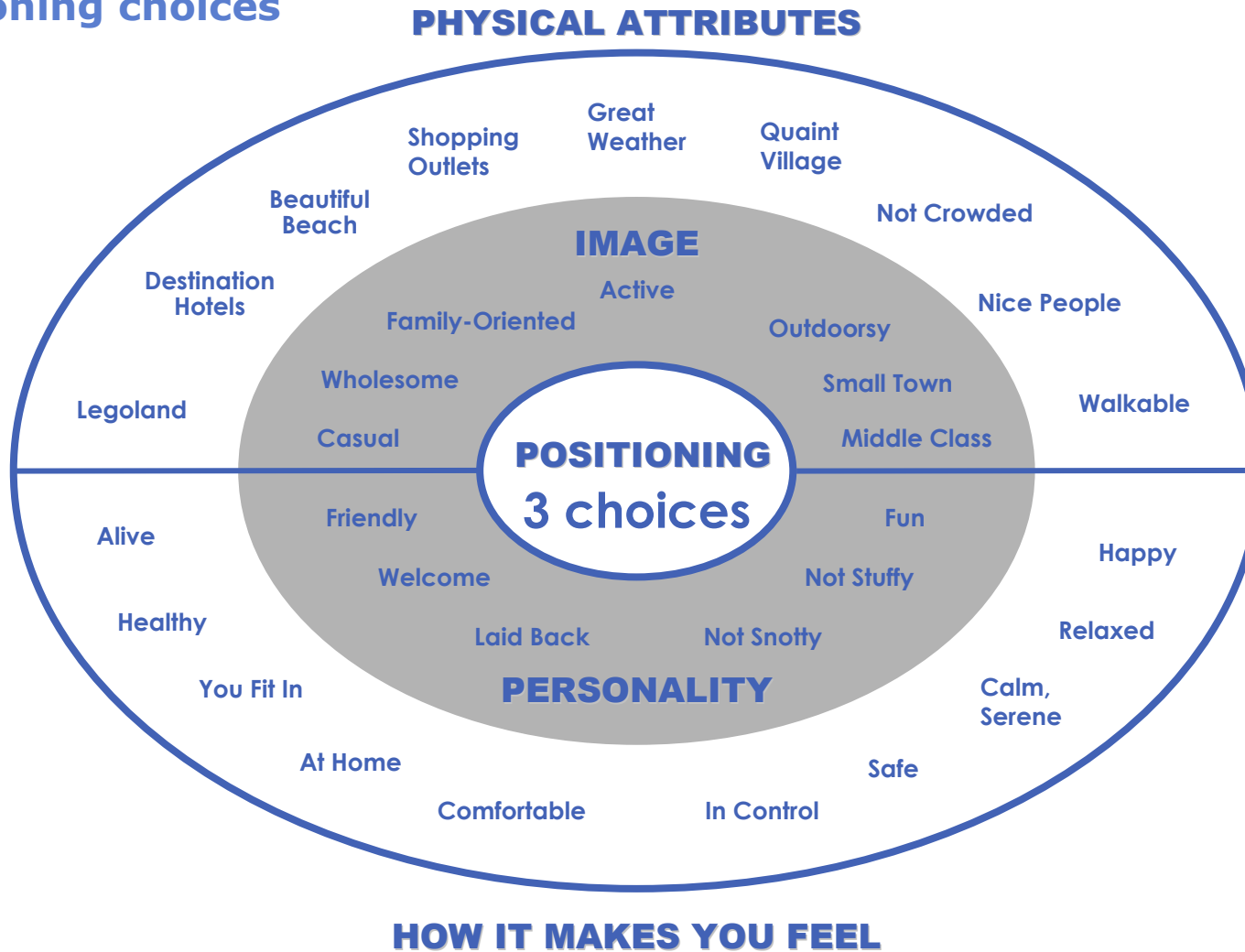
**Our positioning work must address five key challenges:**

- 1: Lack of awareness
- 2: We are competing against some very established nearby destinations
- 3: The name is not descriptive
- 4: Leveraging the visitors to Legoland
- 5: Establishing Carlsbad as a distinct destination

**In an effort to attract more tourists, Carlsbad can draw upon an abundance of appealing resources, qualities and perceptions**

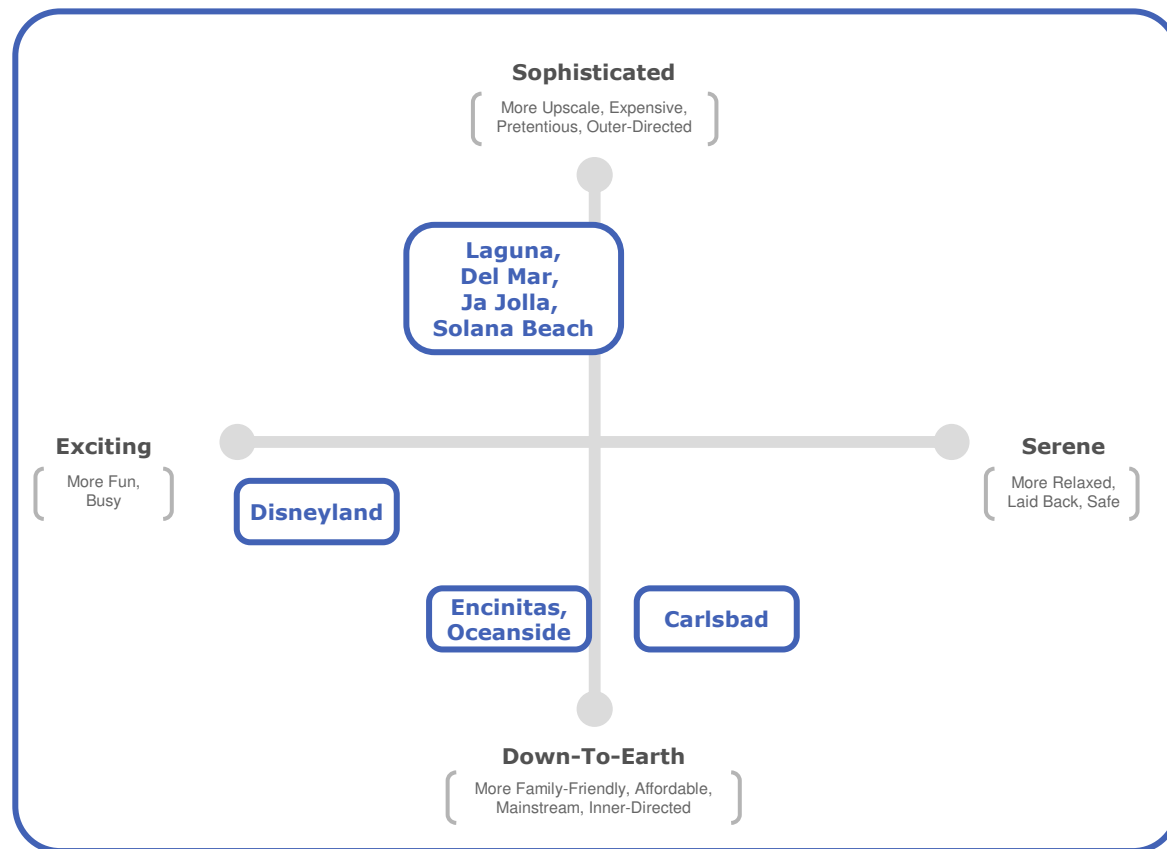
# Overall Conclusions And Recommendations

Carlsbad is a very meaningful brand and we have 3 recommended positioning choices



# Overall Conclusions And Recommendations

These positionings all leverage Carlsbad's current 'Serene' and 'Down-To-Earth' position



## Overall Conclusions And Recommendations

**By leveraging Carlsbad's uniquely laid-back, unpretentious small-town feel, the recommended positionings readily differentiate Carlsbad from nearby destinations**

**The 3 Carlsbad positionings we recommend pursuing and testing are:**

1. A Friendly Place
2. True Escape/Relaxation
3. Southern California, The Way It Should Be

**An alternative strategy is to join with other North County beach towns in promoting the area. We recommend you also test this strategy**

4. North County Regional

**When asked how Carlsbad could improve its town, most visitors resist 'change'**

- But we expect this response from pleased visitors

**The body of our report includes a number of recommendations for improvements**

# Appendix

**Rejected Positioning Ideas**  
**Intercept Interview Guide**  
**In-Depth Interview Guide**

## Rejected Positioning Ideas

The following 5 ideas were considered, but we feel they are not as strong as our 3 recommended positionings

### 1. Family Friendly

An idea generated in our Interactive Innovation session

During our interviews, when we discussed the notion of Carlsbad emphasizing how family-friendly it was, those with families were very positive ...

*“Nice to know kids are welcome”*

...Those without were not

*“Not a chance, I’m a teacher with kids all the time. My husband would kill me”*

*“I like other people’s children, but not on my vacation”*

Family friendly is a possible strategy, indeed it worked for Vegas for a number of years even though Vegas doesn’t support it well, but we believe our 3 recommended positionings will speak to families without turning others off and are more unique messages



## Rejected Positioning Ideas

### 2. **Feel Free**

**An idea generated in our Interactive Innovation session**

**Feeling free is a higher order benefit, indeed the end benefit of being relaxed is that you feel free**

**While people want to rest on vacation and this is an interesting idea, it seems a bit too esoteric/vague or ambiguous for the visitors we spoke to**

- Our True Escape/Relaxation plays in this space, but is less esoteric

### 3. **Reconnect**

**While interesting, it seems more of an adult or spa message and may be too quiet**

- Our True Escape/Relaxation plays in this space, but is less “new-agey”

## Rejected Positioning Ideas

### 4. Happy

**A meaningful idea, part of our brand, a very good fit with Legoland**

**But could be seen as simplistic, and Disney and McDonald's already in this space**

**Fits with our recommended 'Friendly' positioning, is a reason to believe – people are happy so they're friendly**

### 5. The Best Weather

**Welcome to Carlsbad, the town with America's best weather**

- Why Lego choose to put it's only US park, Legoland, here

**Is there any way we can defend a weather claim versus La Jolla, Del Mar?**

- A positioning should be bold and be willing to brag (Huntington Beach: Surf City)
- An intriguing idea, but Carlsbad would need to be feeling aggressive to pull this off

# Interview Guide

## Intercept Guide

Revised 6.10.07

### Introductions and screening:

We want to interview people visiting Carlsbad (or competitive destination) from out-of-town  
Are you visiting and staying overnight in a hotel? (Aim for 40% luxury, 40% full service, 20% limited service. No condo, timeshare, campgrounds)  
Is this a business trip? (Want leisure travelers, but a few interviewees can be on an extended business trip)  
Where do you live? How far is that from Carlsbad? (all must have traveled over 50 miles) \_\_\_\_\_ write in hometown. Include AZ, NV, NM tourists  
Aim for 1/2 with kids traveling with them and for people in the middle/end of their stay

Note: for Prospect Interviews (tourists in surrounding towns) replace 'Carlsbad' with the town we are interviewing in (Solano Beach, Del Mar, etc.) and find out perceptions of Carlsbad  
Name:

1. How long are you visiting Carlsbad (or competitive destination)? [At least 1/2 staying a week plus]
2. How did you get here: fly/drive?
3. Are you visiting other places as part of this trip?
4. Where are you staying?
5. How does it feel to be in Carlsbad? What feelings do you have as you spend time here?
6. What prompted this visit? What are all the reasons you decided to come?
7. What have you done while in Carlsbad? What else are you planning to do?
8. Is this your first visit? If yes, what were you expecting/hoping for? Have these expectations been met? If no, what were you expecting/hoping for on this repeat visit? [If their expectations have not been met, understand where the disappointment has occurred.]
9. What is Carlsbad like to visit? What feeling does this place have? If you had to describe its personality or character, what would you say? What pictures come to mind when you think of Carlsbad? What kind of vacationers choose Carlsbad?
10. What do you love about Carlsbad? What would an ideal trip here be like for you?
11. Do you plan to come back to Carlsbad, if so, why and when?
12. Did you consider any other places instead of Carlsbad? What places did you consider and why did you not choose them? For prospects: did you consider going to Carlsbad? Why/not?
13. What other vacation destinations do you enjoy? Why?
14. Why did you select Carlsbad instead of these other destinations?
15. What is unique about Carlsbad? [Prompt beyond individual attractions to unique feelings/character]. What surprises have you experienced in Carlsbad? What improvements do you hope Carlsbad will make over the next ten years?
16. What other destinations do you consider comparable to Carlsbad? How are they similar/different?
17. On this visit, what trips outside of Carlsbad have you taken? Plans to?
18. On what have you spent your money while in Carlsbad? Have you spent more or less than you anticipated? Have you purchased any mementos of your vacation? What else could Carlsbad offer that would be worth spending money on?

[Thank participant for their help. If especially thoughtful, invite to in-depth.]

## In-Depth Guide

[Thank for coming. Offer beverages. Explain that we have selected them as they were especially observant and thoughtful.]

### Market Restructuring

In this exercise, we ask participants to place competitive destinations along the spectrum of opposing viewpoints, to ascertain their relative positions, strengths and weaknesses.

#### Destinations:

Carlsbad, Solano Beach, Del Mar, Laguna Beach,  
Rancho Santa Fe, San Diego, Del Coronado, Palm  
Springs, Las Vegas, Santa Barbara, Dana Point, La  
Jolla

Place viewpoint cards on opposite ends on the table:

- More Relaxing/More Exciting
- More To Do/Less To Do
- More Fun/Less Fun
- Premium / Value or Luxurious/Basic
- More My Kind of Place / Less My Kind of Place
- Changing in a Positive Way/Changing in a Negative Way
- Unique and Distinct/Commonplace and Unsurprising
- Safe/Risky
- Hard/Easy
- Adventure/Resort

Ask respondents about each viewpoint:

- What does it mean to be \_\_\_\_?
- Which dimensions matter most in your lives right now?
- What is required to be at this position (for the positive ones)?
- What does it take to be a winner in this area?

Place all competitive destination cards on coffee table, and ask respondents to place them along a spectrum between these opposing viewpoints, probing:

- Why are they placed there?
- What does this say about them?
- What makes one better than the other?

### Destination Personification:

Participants imagine Carlsbad as a person who has just walked into the room.

# Interview Guide

We ask participants to think of who this person is, and to describe him/her.

- Probe: male/female, what wearing, how behaving, personality, occupation, where live, kinds of friends
- Describe potential relationship with this person, what role they might have in your life

Repeat for competitive destinations and compare.

## **Unfinished Stories**

We ask respondents to complete a story, probing the feelings and emotions of the people and experiences they are describing:

Ira and Sofia went to Carlsbad on a long weekend break. Looking at them, you'd say they're the type of people who .....

Flora always feels something special when she visits Carlsbad. Describe what Flora feels and why she feels that way.

Dave said "When I first came to Carlsbad I was surprised by ..." What was Dave surprised by?

When a friend asked Jesse why she had vacationed in Carlsbad on several occasions, Jesse replied "The reason I love coming to Carlsbad is ..... " What reason did Jesse give?

## **Visual Sort**

Review a range of images (all will be coded) that include key Carlsbad landmarks and pictures that capture various moods and feelings. Ask participants to sort images into two piles – those that capture Carlsbad in an appealing way and those that do not. Discuss reasons why. Understand what appealing images and feelings are missing from this deck.

Thank you.



# **Regional Traveler Survey Carlsbad Messaging Project**

**Presented to Carlsbad Tourism Business Improvement District by  
Destination Analysts, Inc. September 25<sup>th</sup>, 2007**

# Project Overview

- **Online survey**
- **Conducted September, 2007**
- **Survey respondents must:**
  - **Be adults living in Nevada, Arizona or California (and not San Diego County)**
  - **Travel for leisure at least 2 times/year**
  - **Express an interest in leisure travel to Southern CA**
  - **Not be employed in ad/research agency or DMO**
- **670 fully-completed surveys**
- **Confidence interval: +/- 3.8%**

# Research Goals

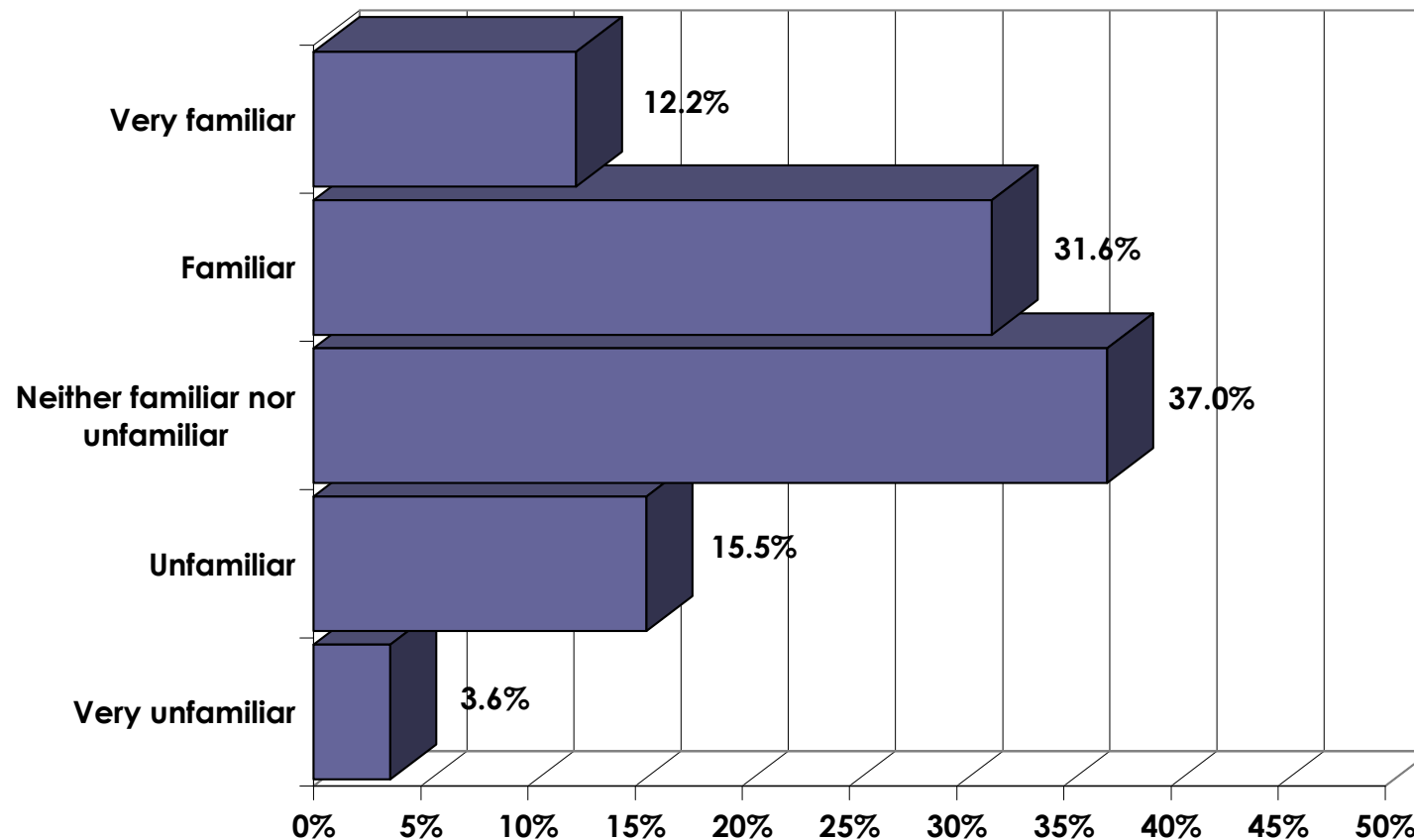
- **Benchmark travelers' understanding of the Carlsbad tourism brand**
- **Determine (from the potential visitors' perspective) the most effective of the four Carlsbad messaging proposals developed by Wright Group**

# Benchmarking Overview

- **Moderate familiarity with regional tourism assets**
- **Unaided awareness of Carlsbad is low**
- **Aided awareness of Carlsbad is high**
- **Perceived familiarity with Carlsbad tourism assets is low, as is unaided recall of attractions/activities**
- **Despite this, Carlsbad's appeal is strong**

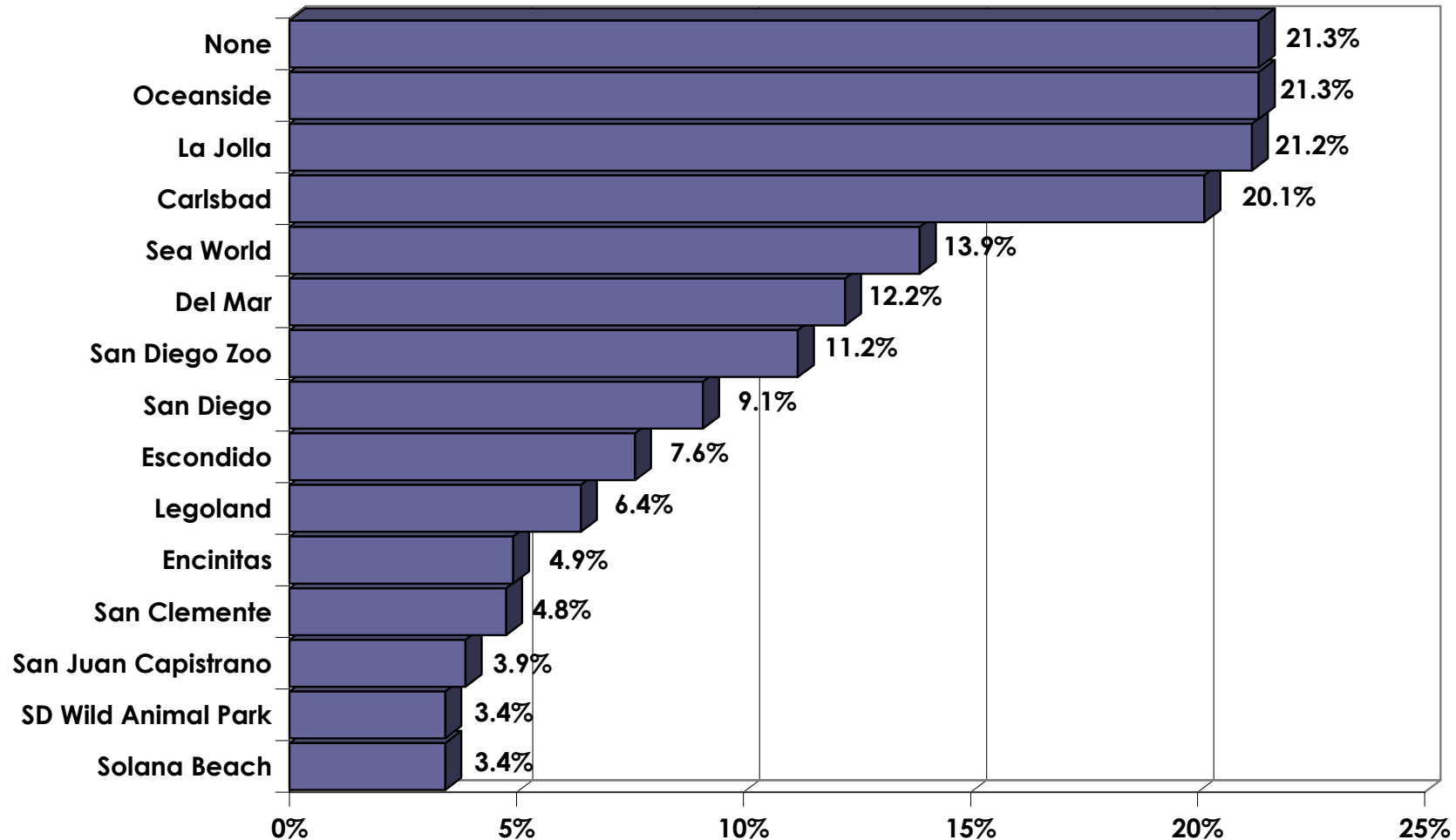


# Familiarity With Regional Cities, Towns & Attractions



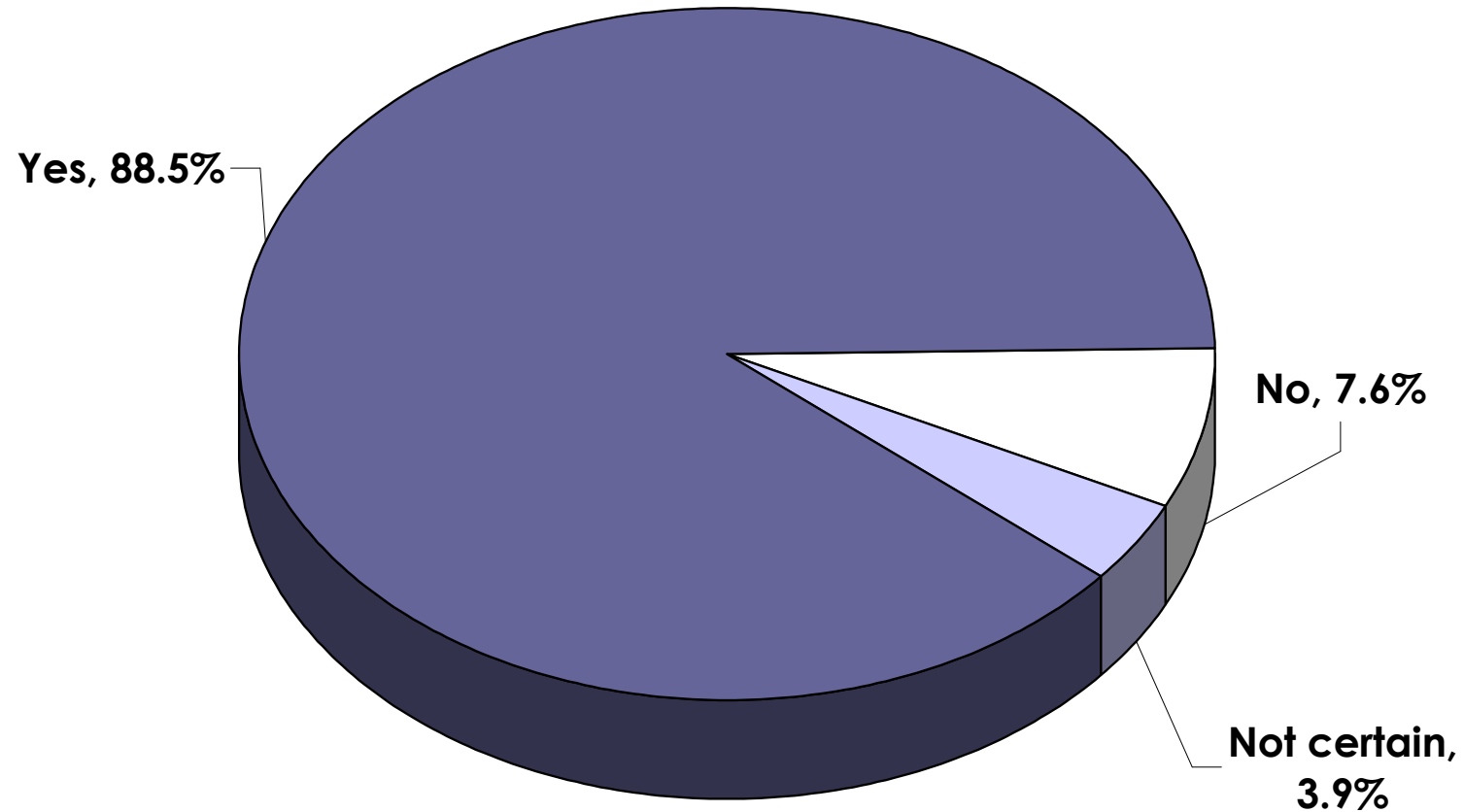
Q 6) How familiar are you with the cities, towns and attractions in the coastal areas of northern of San Diego County (i.e., north of the city of San Diego but south of Orange County)?

# Awareness of Regional Cities, Towns & Attractions (Unaided)



Q 7) When you think of the cities, towns and attractions in the coastal northern San Diego County area, which first come to mind?  
(If no cities, towns or attractions come to mind, please enter "none" in the top space below.)

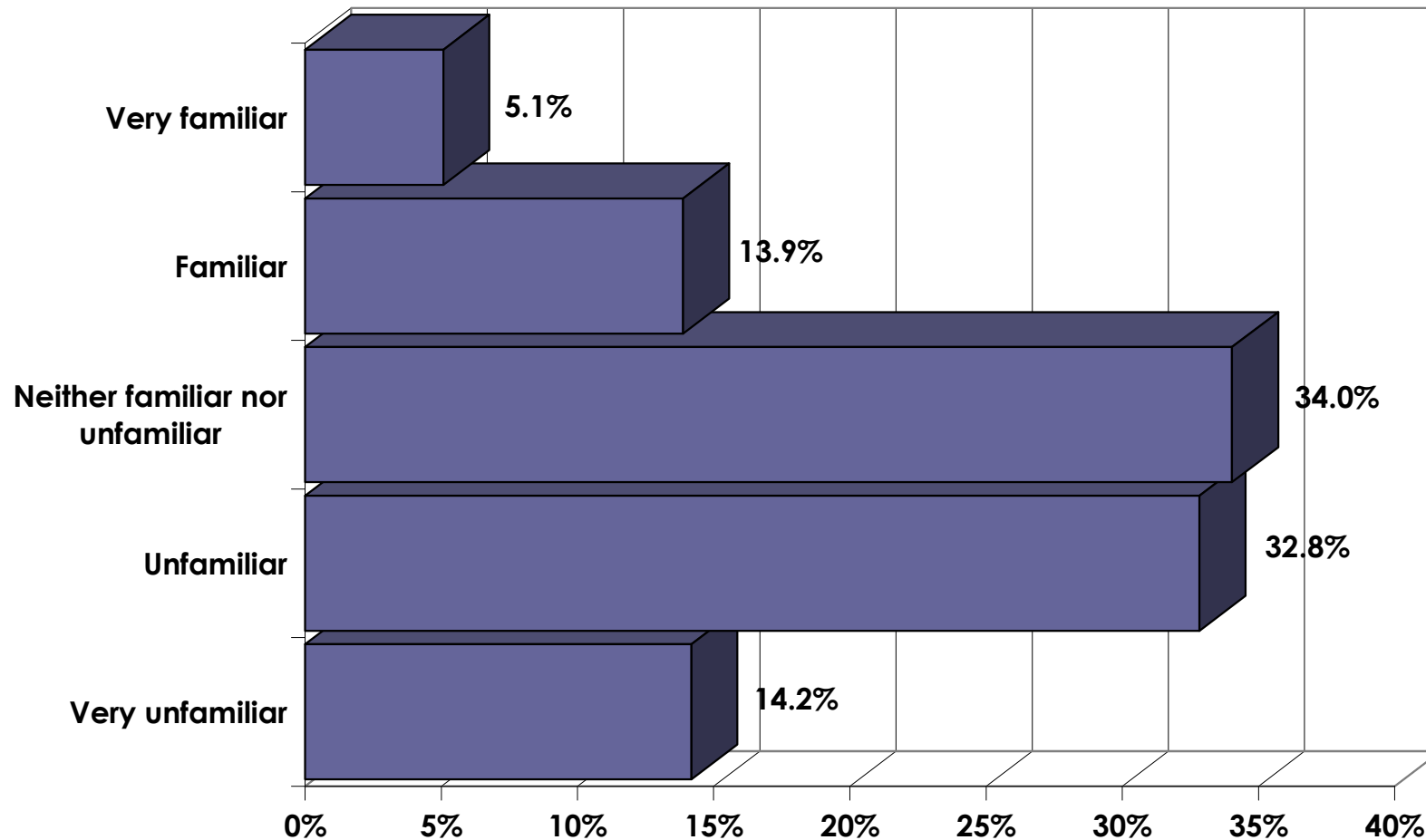
# Awareness of Carlsbad (Aided)



Q 8) Have you ever heard of the city of Carlsbad, California?

Carlsbad Positioning Exploratory

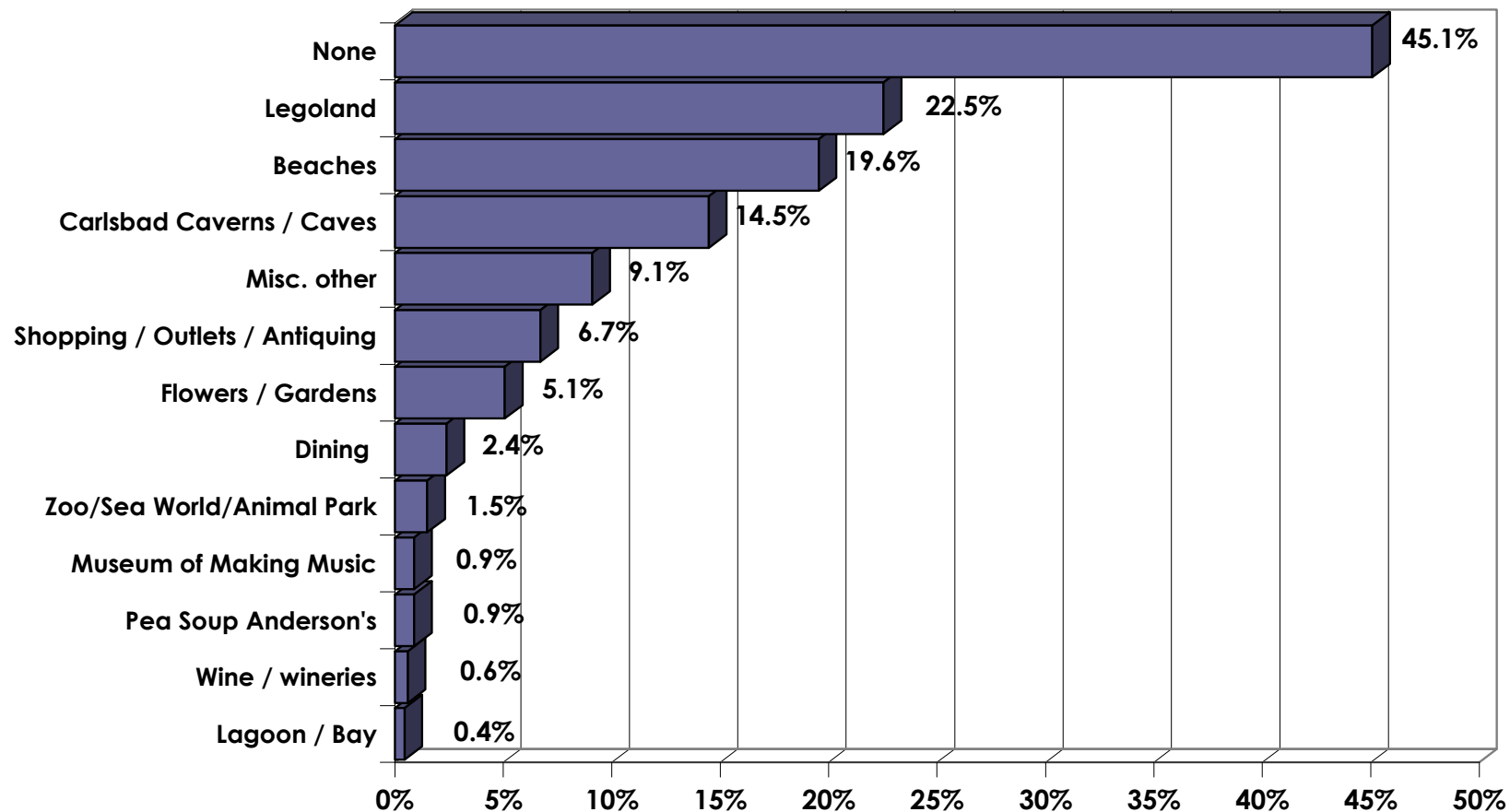
# Perceived Familiarity With Carlsbad's Attraction's & Activities



Q 9) How familiar are you with the attractions and things to do in Carlsbad, California? (Select one)

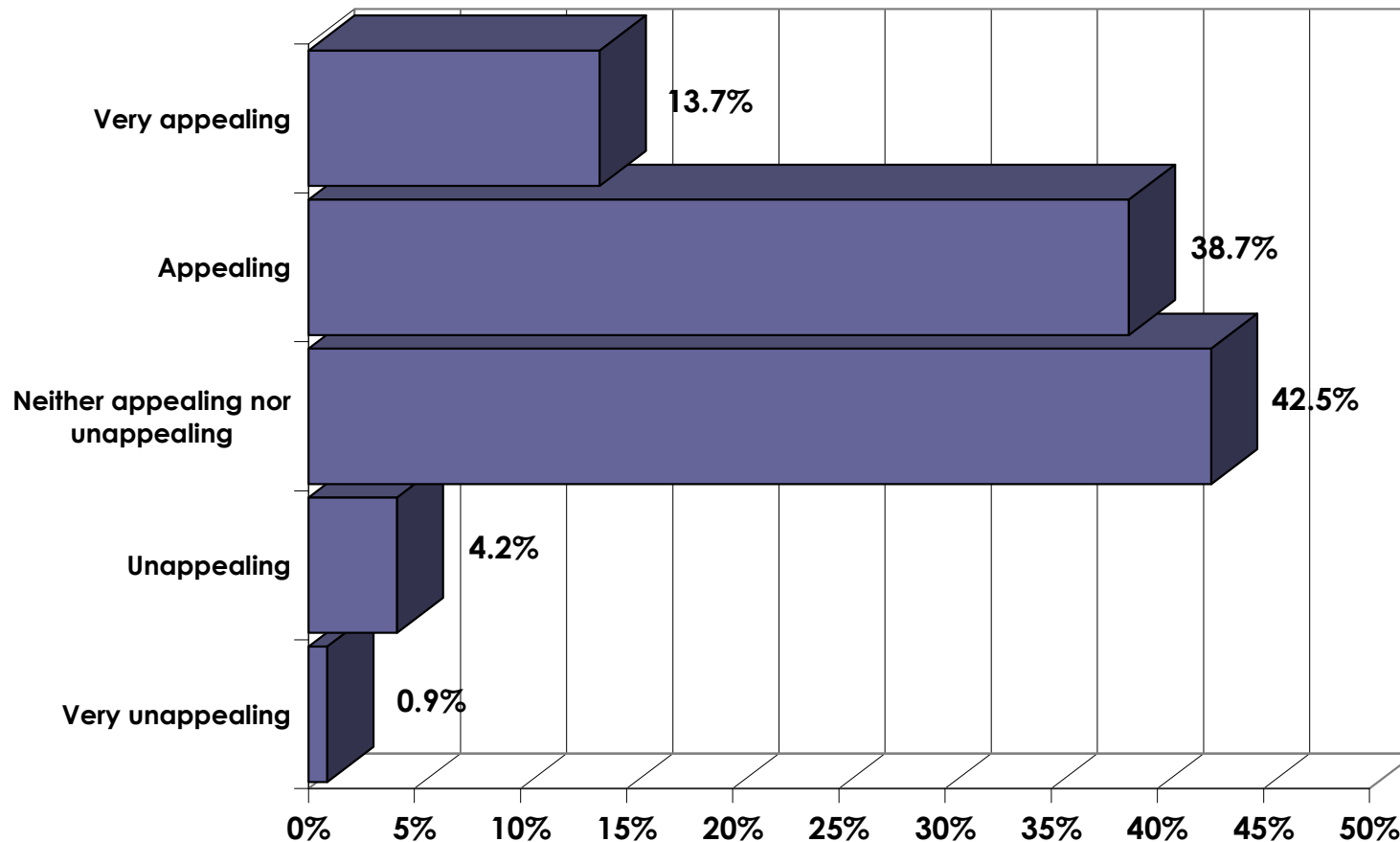
Carlsbad Positioning Exploratory

# Awareness of Carlsbad's Attractions & Activities (Unaided)



Q 10) When you think of Carlsbad, California, what attractions and things to do first come to mind? (If no attractions or things to do come to mind, please enter "none" in the top space below.)

# Appeal of Carlsbad as a Leisure Travel Destination



Q 11) Given what you currently know, how appealing would you find Carlsbad as a destination for a vacation or getaway?  
(Select one)

# Positioning Analysis

- **Messaging were very well-received**
- **Survey suggests that “The Friendliest Beach Town” treatment has best chance of success.**
  1. **Somewhat stronger overall “appeal”**
  2. **Least likely to be selected as LEAST appealing**
  3. **Significantly stronger appeal than regional messaging**

# Verbatim Quotes

- **I would visit for the laid back feeling of the locals. The fresh air sounds great too. The shopping sounds extra nice. Think I'll pack and leave this weekend.**
- **It is someplace I never thought about visiting, but after reading about it I might like to go there and visit.**
- **I am ready to pack my bags and go to Carlsbad.**
- **It makes me want to go there, take my shoes off and relax, relax, relax!**
- **I'm leaving now for Northern San Diego County - you've made it that appealing!**



# **#1 Welcome To Carlsbad, The Friendliest Beach Town In California**

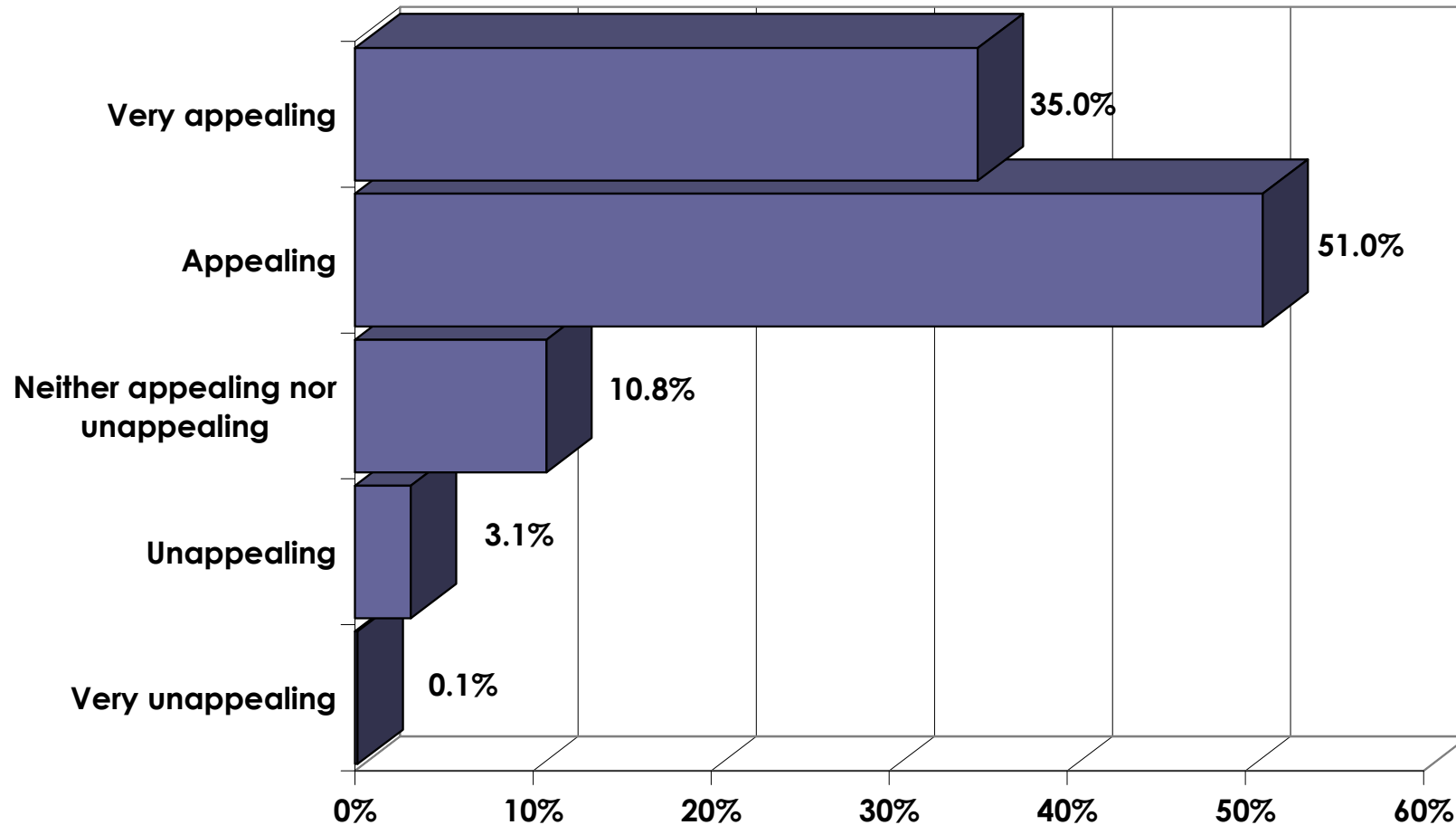
You notice little things when you arrive in a new place – the atmosphere, the mood, the welcome. Those little things can make or break a vacation.

You're going to feel the welcome from Carlsbad. Thirty miles north of San Diego, this is a warm and beautiful beach town filled with friendly people, people who seem happy to meet you and who are eager to share their town with you. Blessed with seven miles of sunny beaches, Carlsbad is a great place to be, and both the locals and the visitors seem to share that feeling. People aren't in a hurry to get from here to there: they might walk or bike to the village center for a coffee, or meet at the seawall to watch the sun set. Of course, with this much room and natural wealth, there's plenty to do in Carlsbad: those uncrowded beaches could be just the place to learn to surf, or to go for a jog and breathe the fresh air coming in off the ocean; and Legoland and Premium Outlet shopping are right here, too.

Carlsbad is ready to welcome you with a smile.

# Appeal of Recommendation #1

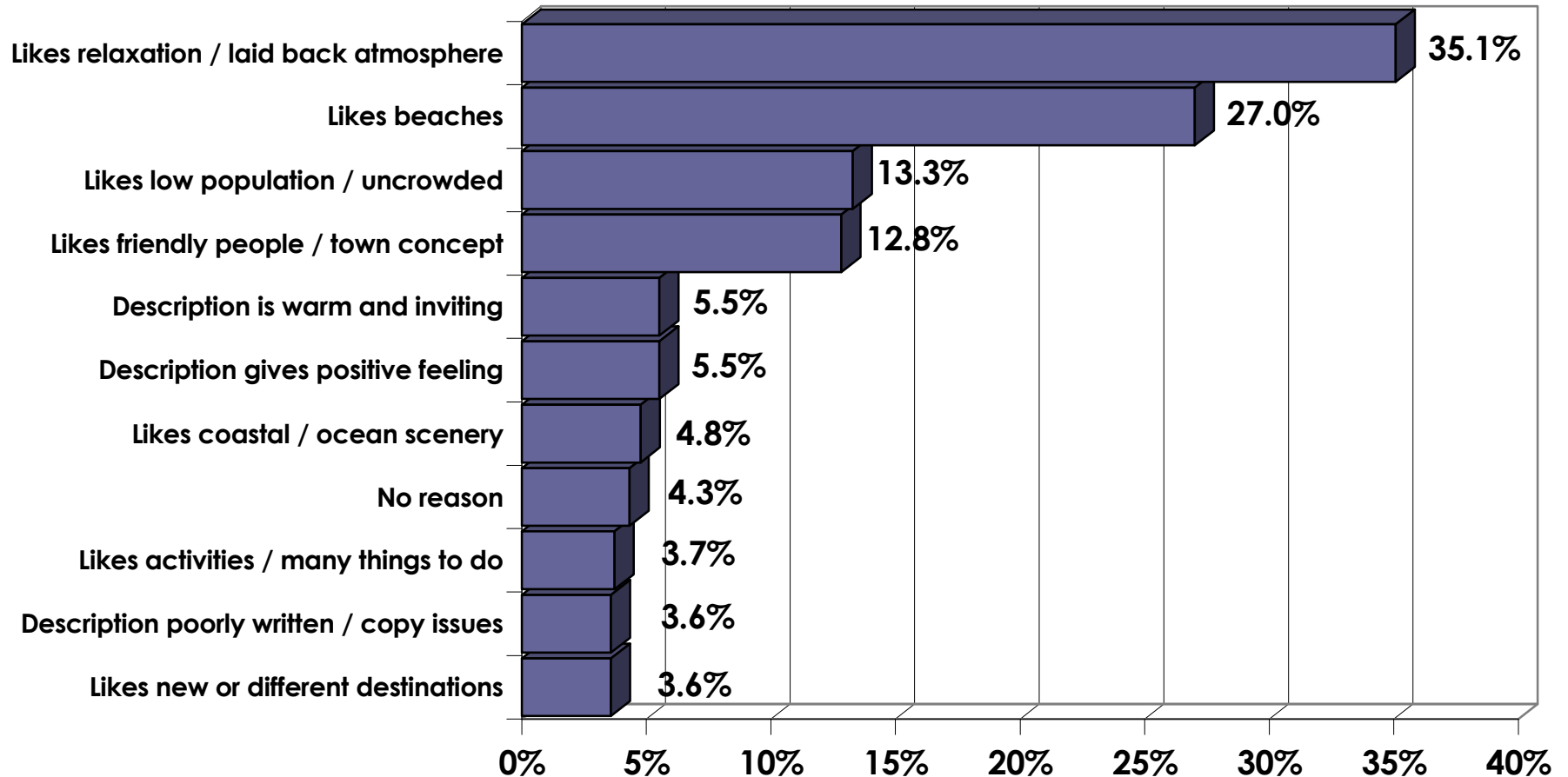
(Welcome To Carlsbad, The Friendliest Beach Town In California)



Q 12) In general, how appealing would you find this description of Carlsbad as inspiration for a vacation or getaway?

# Reason for Messaging Appeal

(Welcome To Carlsbad, The Friendliest Beach Town In California)



Q 13) In a few words, please explain why you feel this way? (Please be as descriptive as possible)

Carlsbad Positioning Exploratory

## #2 Discover Carlsbad's Genuine Relaxation

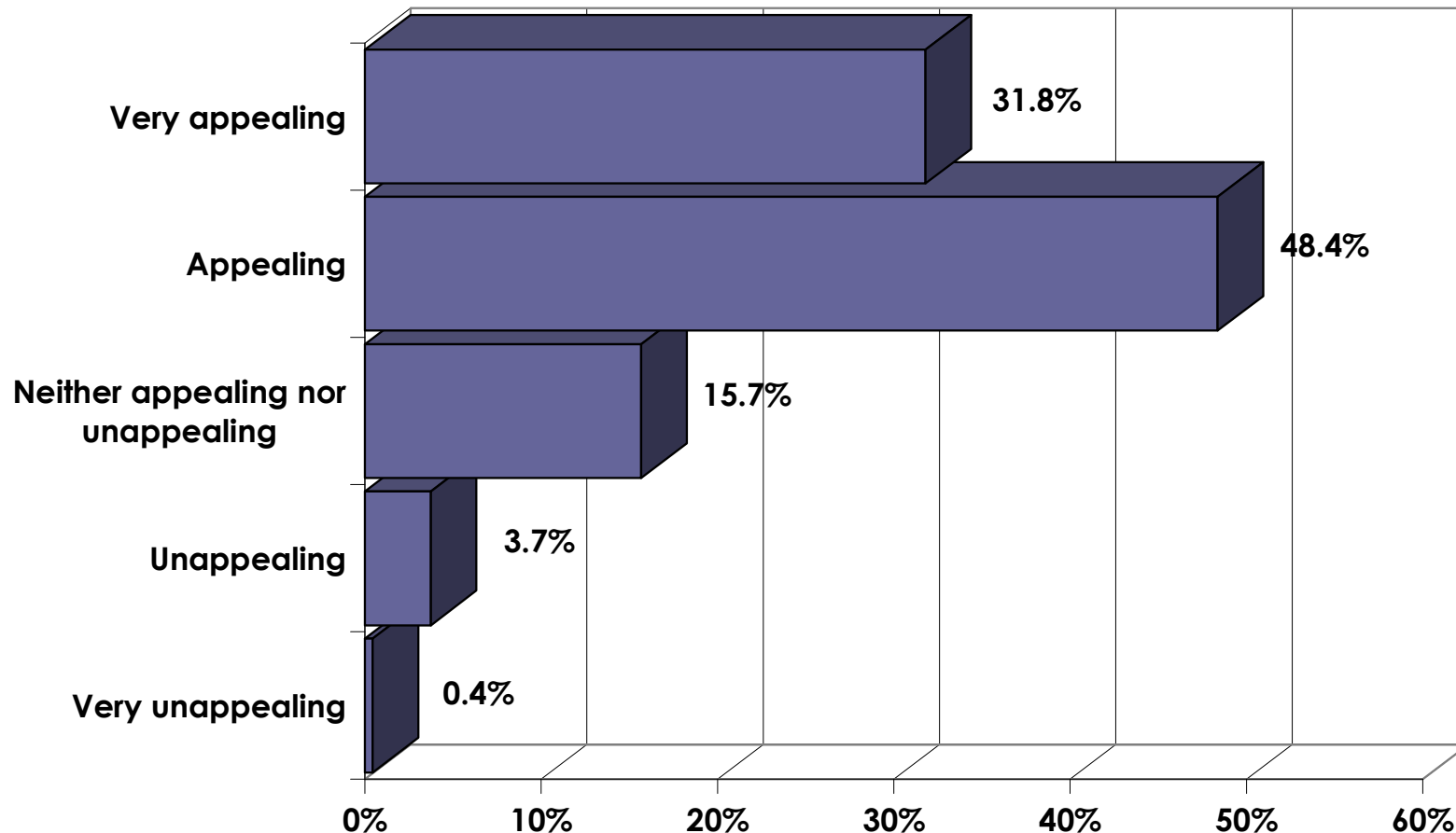
Some vacations can be overly stressful. You feel you're competing against other visitors as you jostle in long lines at the must-see attractions and restaurants.

Carlsbad is a place to kick back and enjoy yourself, a place where you really can leave the daily grind and your troubles behind. Sure, there are world-class attractions like Legoland and Southern California's sun, and seven miles of beaches and abundant nature trails right here, but Carlsbad offers something more: genuine, small-town charm that relaxes visitors and locals alike. Carlsbad is a quiet and unpretentious beach town, 30 miles north of San Diego. It's the kind of getaway place that people dream of: a town for walking and cycling, for taking in the sunset on the seawall or chilling at a sidewalk cafe in the village.

Discover Carlsbad, and take it easy.

# Appeal of Recommendation #2

(Discover Carlsbad's Genuine Relaxation)

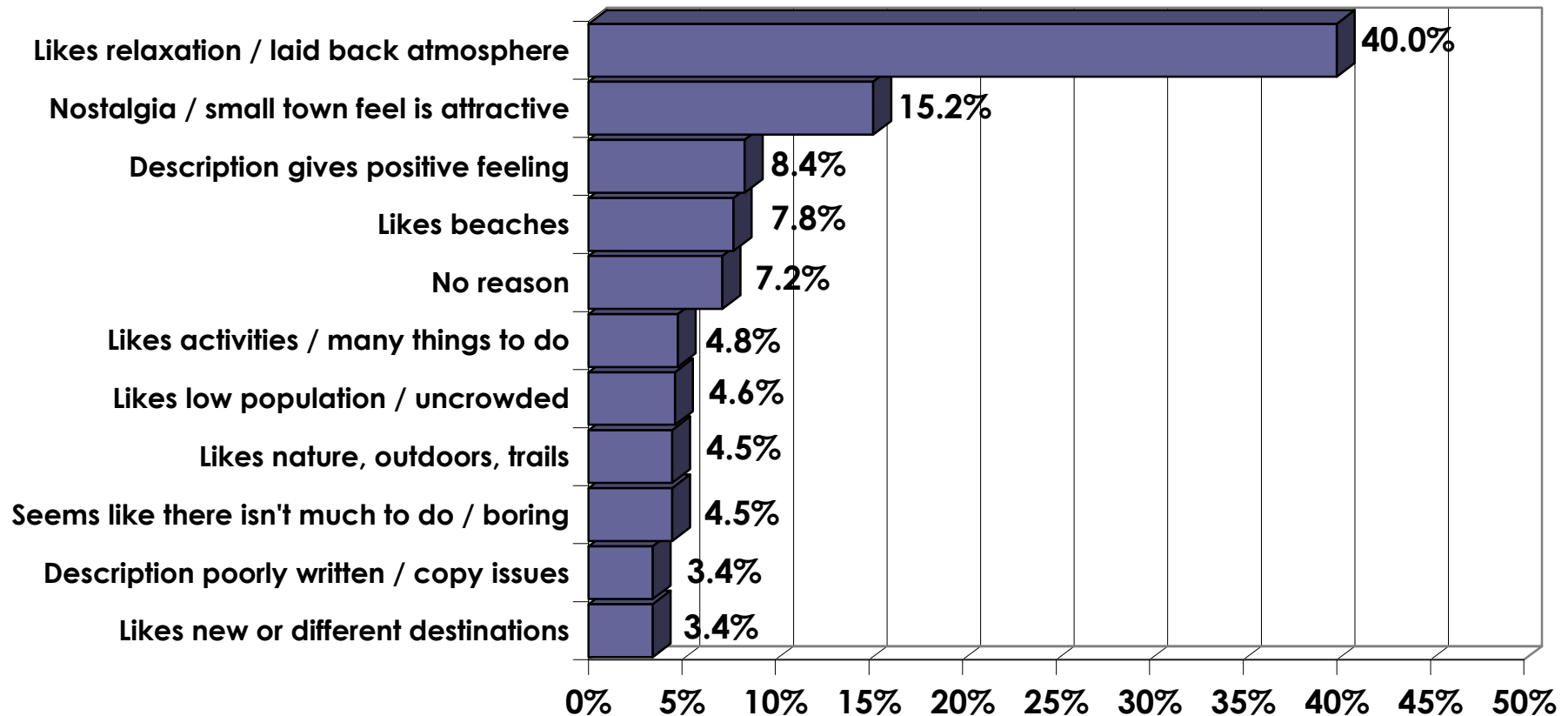


Q 16) In general, how appealing would you find this description of Carlsbad as inspiration for a vacation or getaway?

Carlsbad Positioning Exploratory

# Reason for Messaging Appeal

(Discover Carlsbad's Genuine Relaxation)



Q 15) In a few words, please explain why you feel this way? (Please be as descriptive as possible)

Carlsbad Positioning Exploratory

# **#3 Discover Carlsbad: It's Southern California, The Way It Should Be**

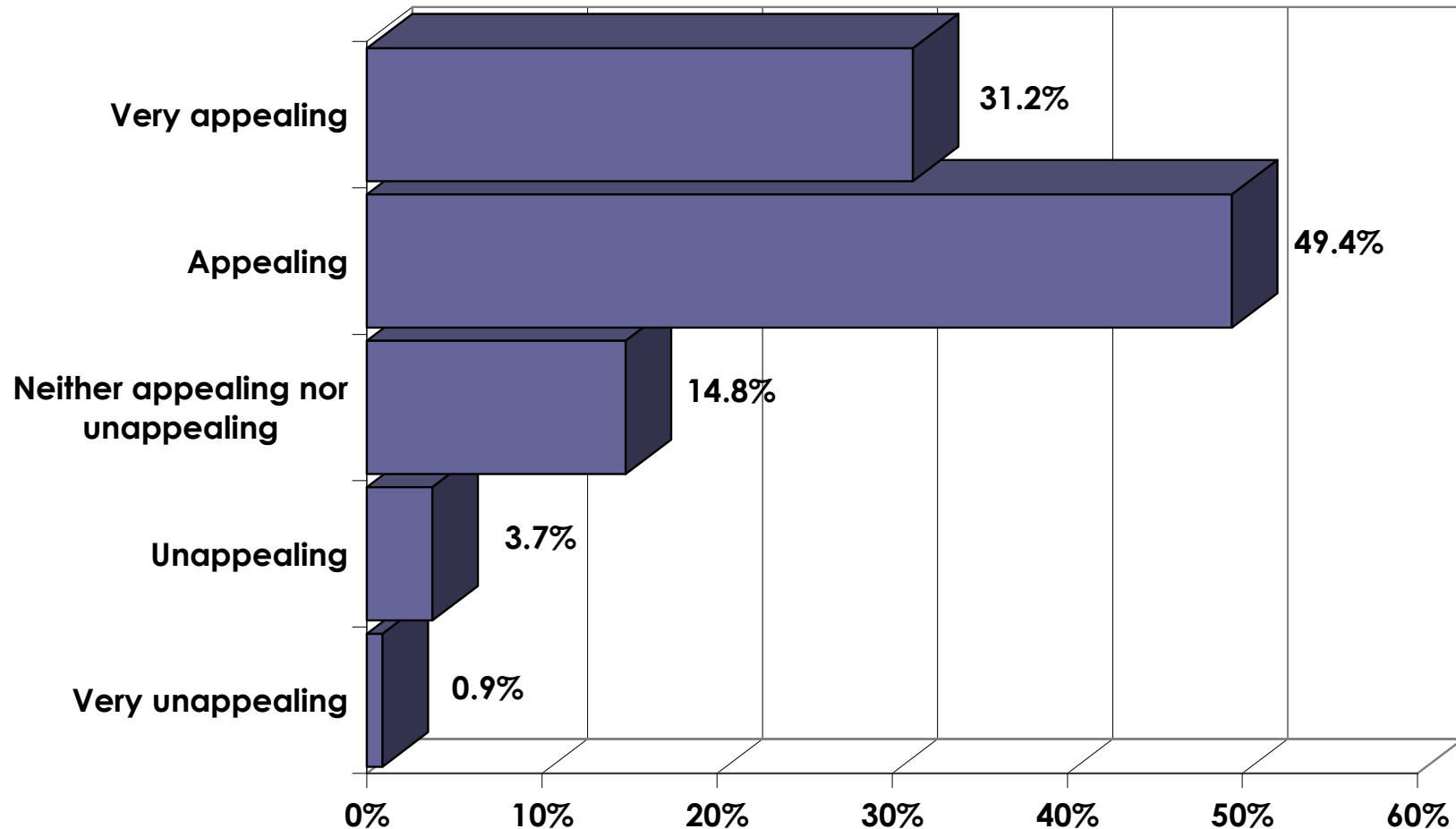
Imagine your favorite Southern California beach town as it was before the crowds, strip malls and smog.

Carlsbad is as beautiful today as the Southern California of your memories or imagination. You'll find perfect year-round weather and seven miles of pristine beaches in Carlsbad. There isn't much in the way of big-city bustle here: people would rather park their cars and enjoy the day on foot, strolling along the shore or ambling through the quaint mom-and-pop shops in the village. There's room to breathe here, so you don't feel crowded or hurried -- Carlsbad pioneered the open space movement. The town has seen some terrific enhancements in the past few decades, too: a Premium Outlet Mall and Legoland have chosen to put down roots in Carlsbad. Isn't it good to know that just 30 miles up the coast from San Diego there's still an authentic, easy-going beach town?

Carlsbad reminds us what a beach town should be.

# Appeal of Recommendation #3

(Discover Carlsbad: It's Southern California, The Way It Should Be)

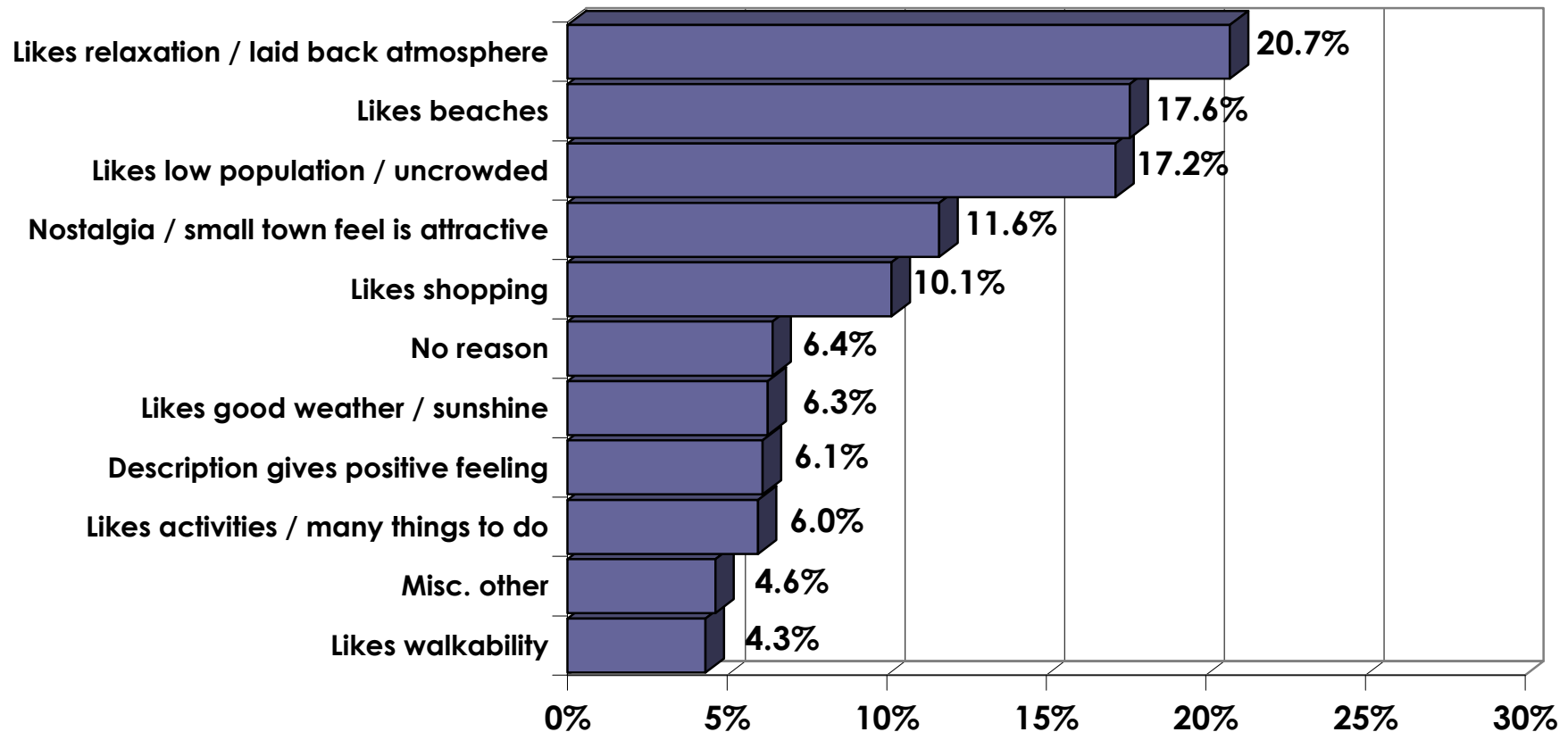


Q 14) In general, how appealing would you find this description of Carlsbad as inspiration for a vacation or getaway?



# Reason for Messaging Appeal

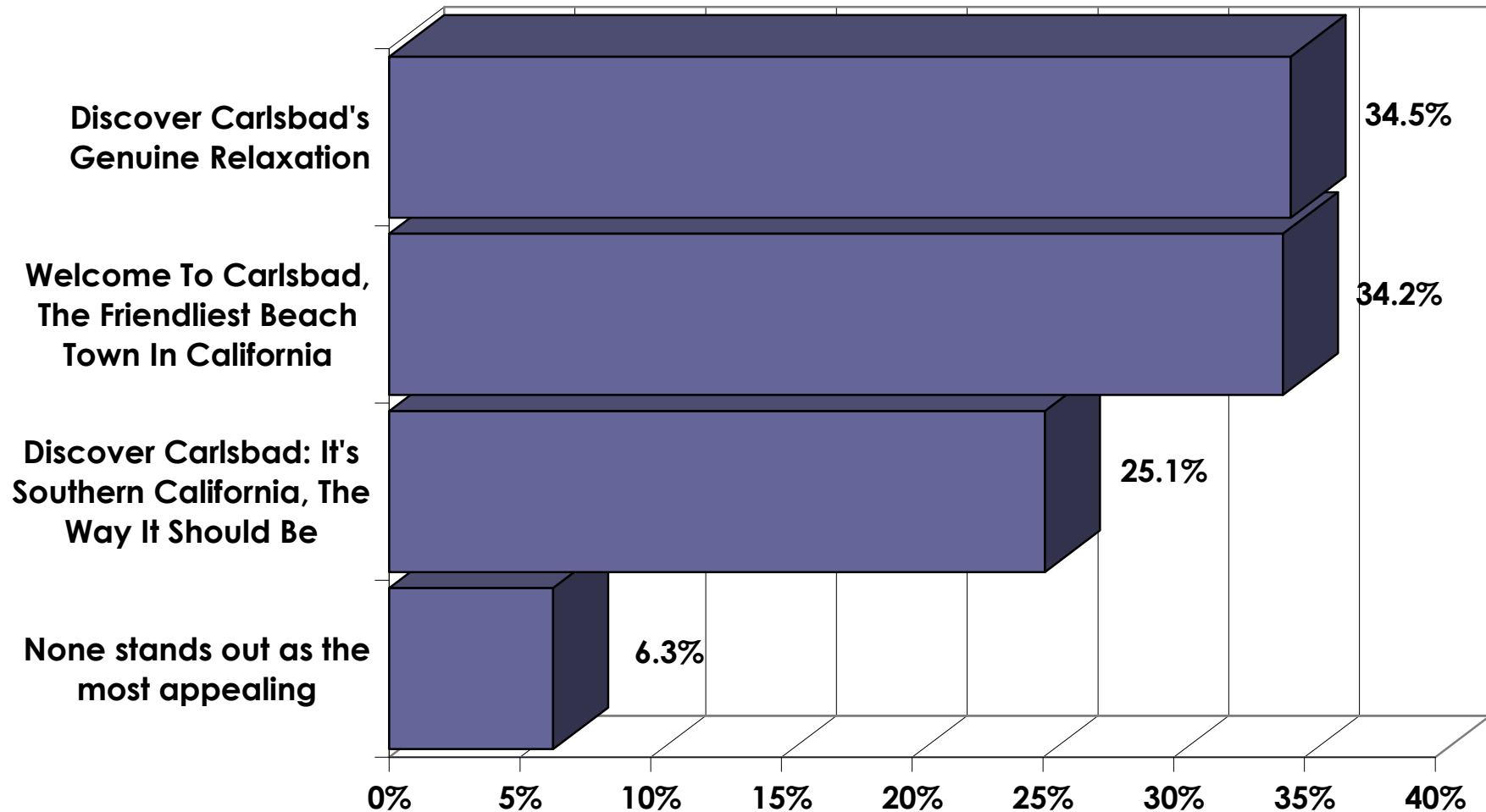
(Discover Carlsbad: It's Southern California, The Way It Should Be)



Q 15) In a few words, please explain why you feel this way? (Please be as descriptive as possible)

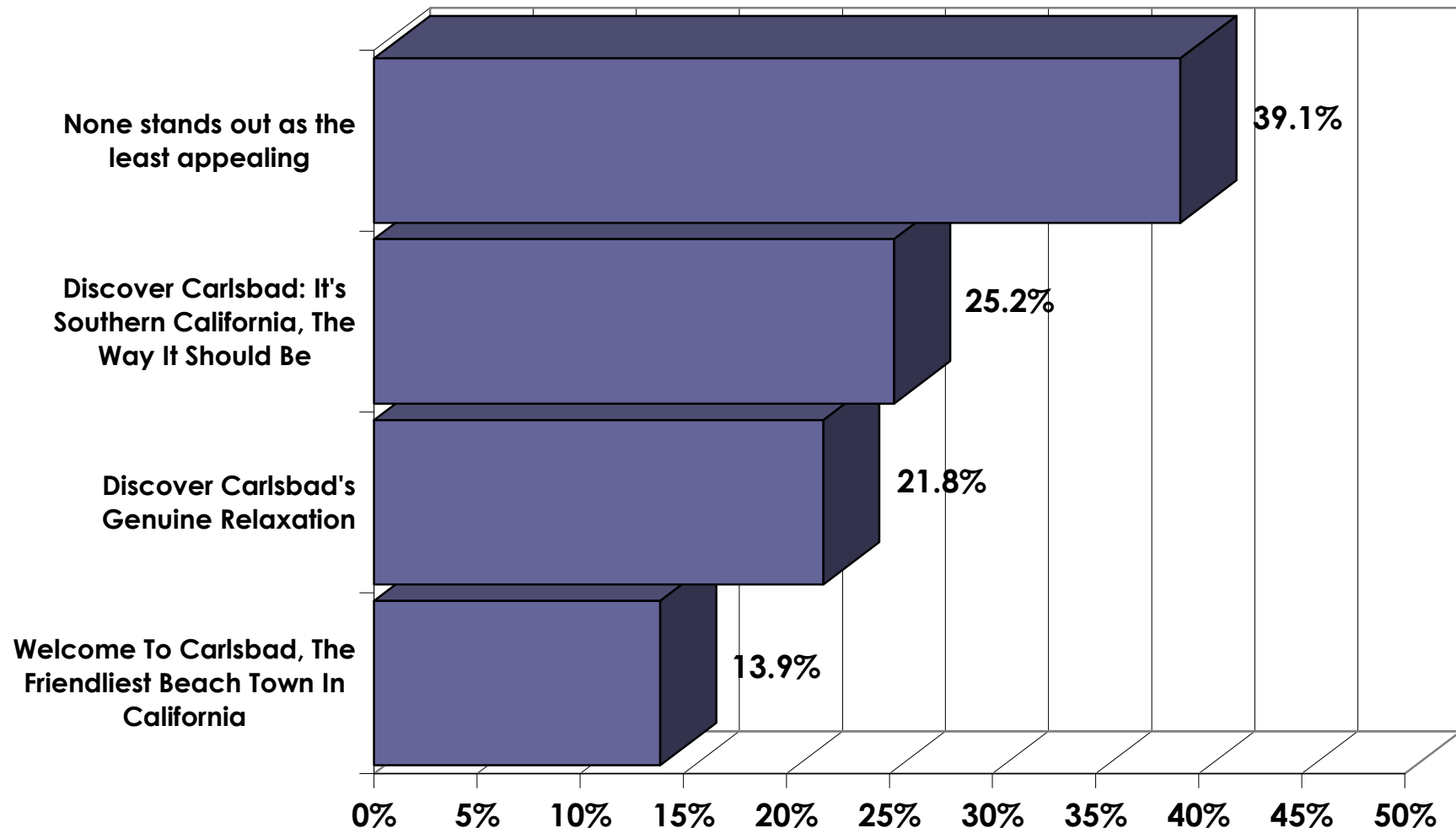
Carlsbad Positioning Exploratory

# Most Appealing Messaging



Q 18) Now consider the three descriptions again. Which of these do you find the MOST APPEALING?

# Least Appealing Messaging



Q 19) Which of these do you find the LEAST APPEALING?

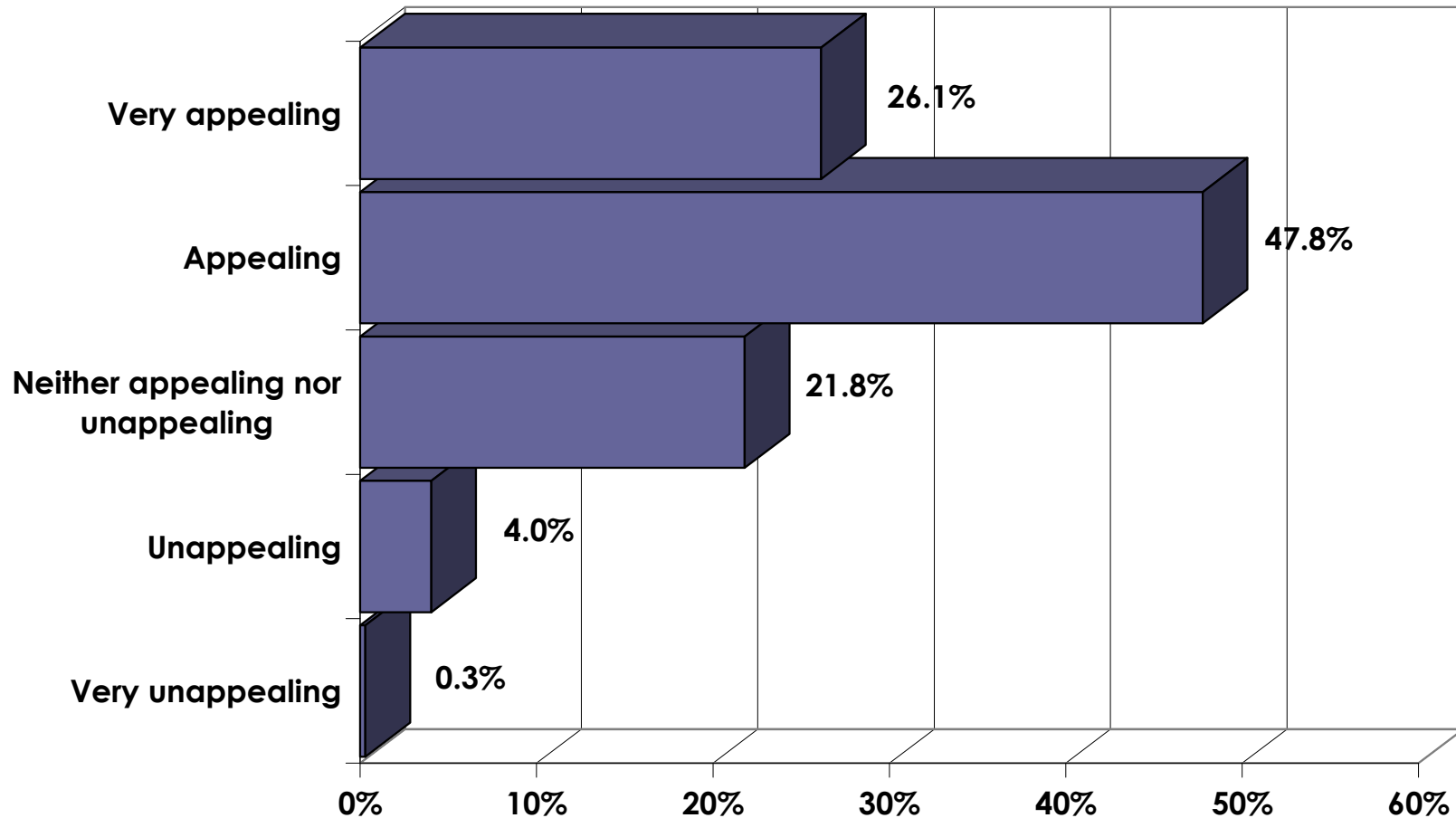
## **#4 Discover The San Diego Beach Towns For A More Relaxed Southern California Experience**

In the beach and foothill towns north of San Diego, you'll find sunny days and balmy nights, broad white-sand beaches and rolling golden hills, and the easy-going tempo and laid-back style we're famous for. This is open country, ripe for exploration, with world-class resorts and spectacular scenery. Stroll the boardwalk in Oceanside, cycle along Carlsbad's seawall, or join a pickup volleyball game in Solana Beach. Taste your way through the wineries around Escondido, or watch the ponies run at the Del Mar Fairgrounds.

The San Diego Beach Towns are the Southern California you've been looking for.

# Appeal of Recommendation #4

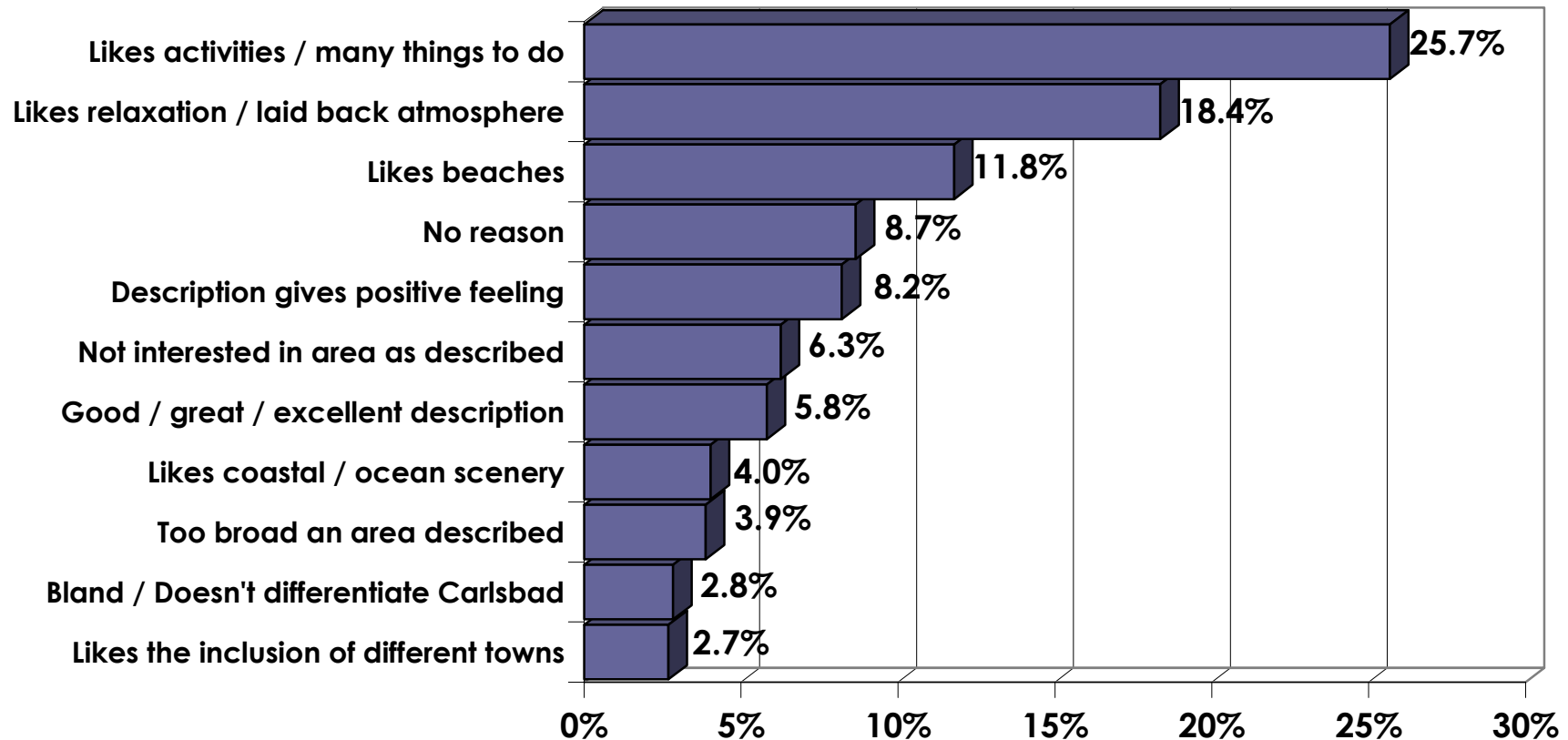
(Discover The San Diego Beach Towns For A More Relaxed Southern California Experience)



Q 20) In general, how appealing would you find this description of Carlsbad as inspiration for a vacation or getaway?

# Reason for Messaging Appeal

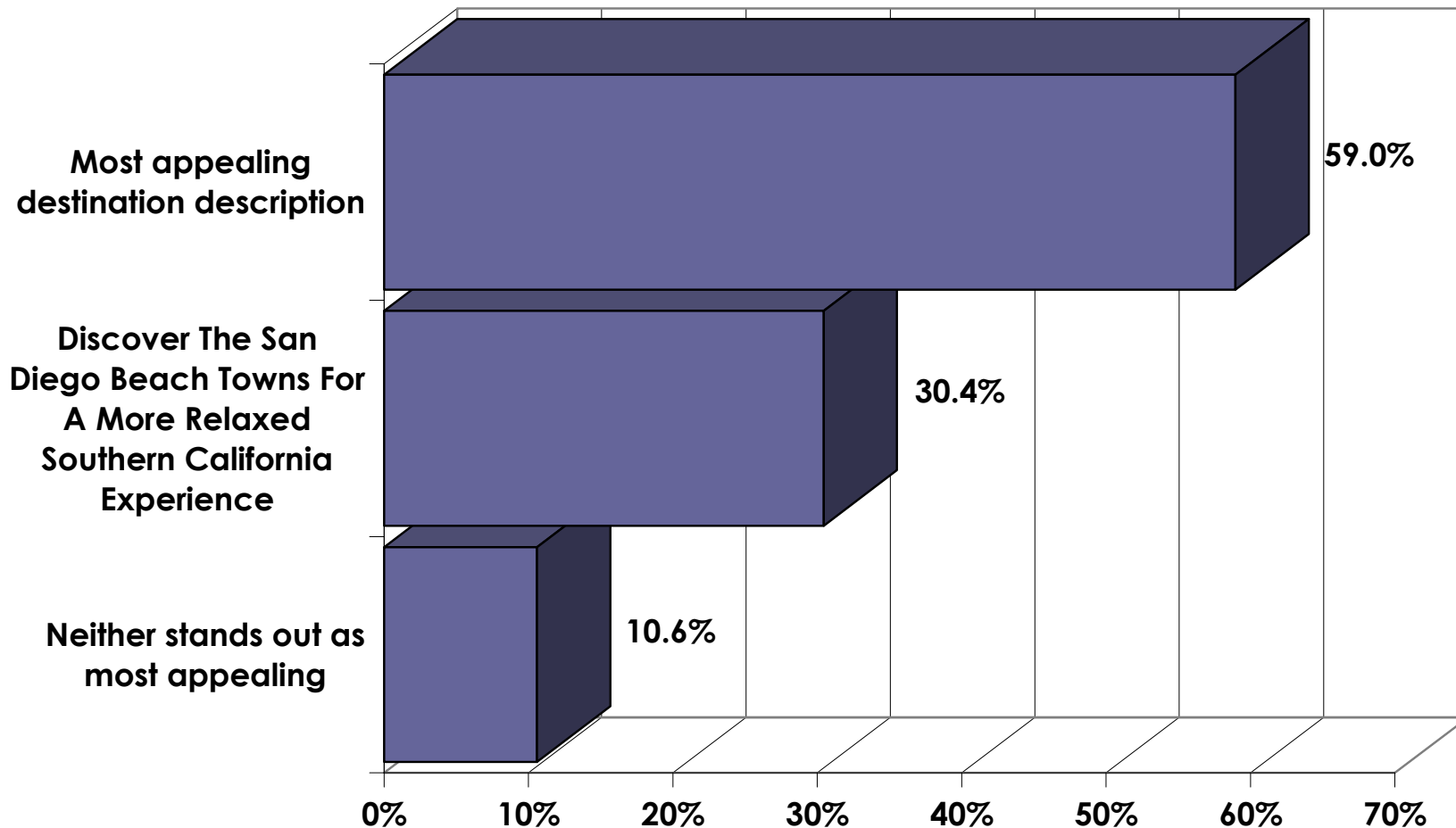
(Discover The San Diego Beach Towns For A More Relaxed Southern California Experience)



Q 21) In a few words, please explain why you feel this way? (Please be as descriptive as possible)

Carlsbad Positioning Exploratory

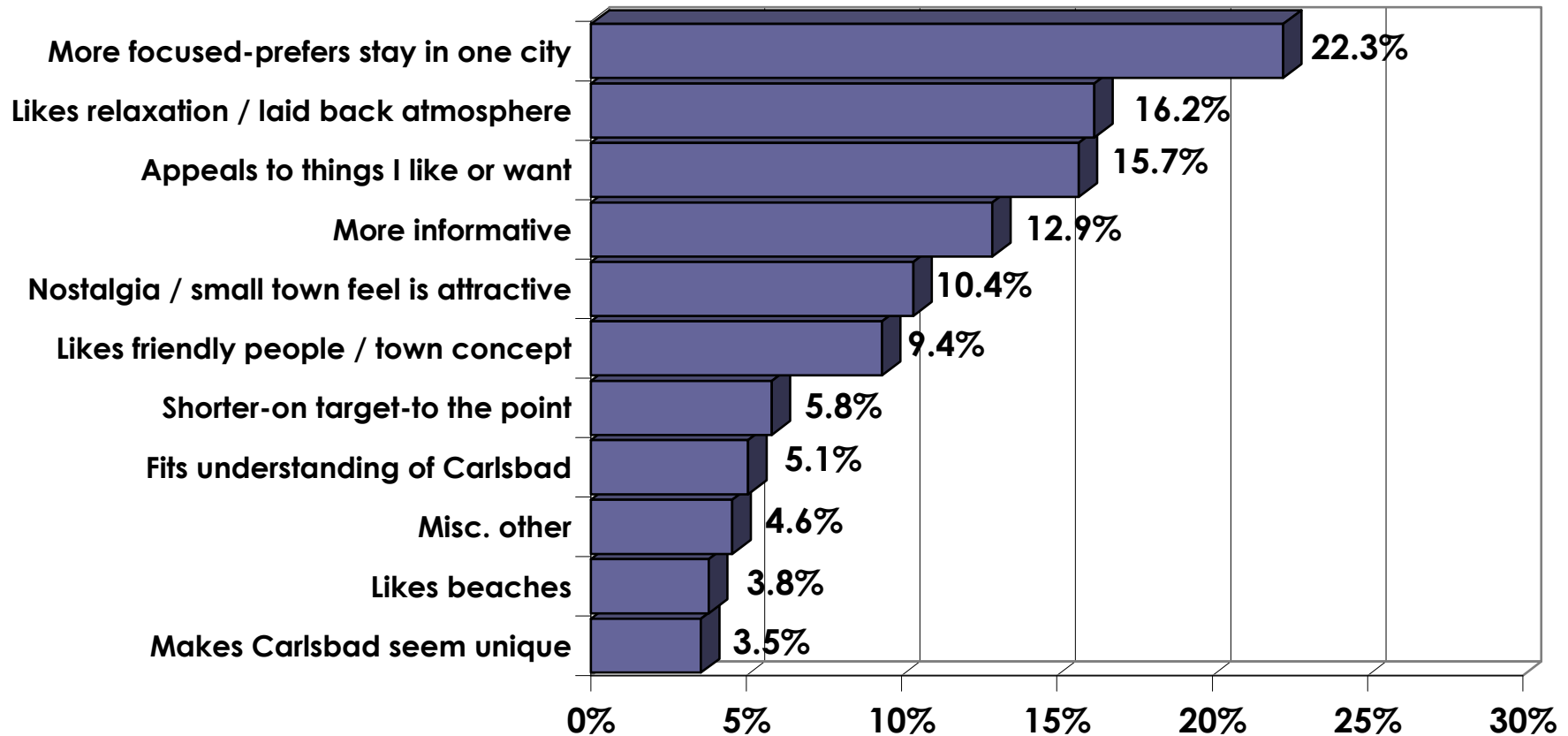
# Regional vs. Carlsbad Focus



Q 22) As a leisure traveler, which of these descriptions would you generally find to be more appealing? (Select one)

# Reason for Preference

(Prefers Carlsbad-focused description)

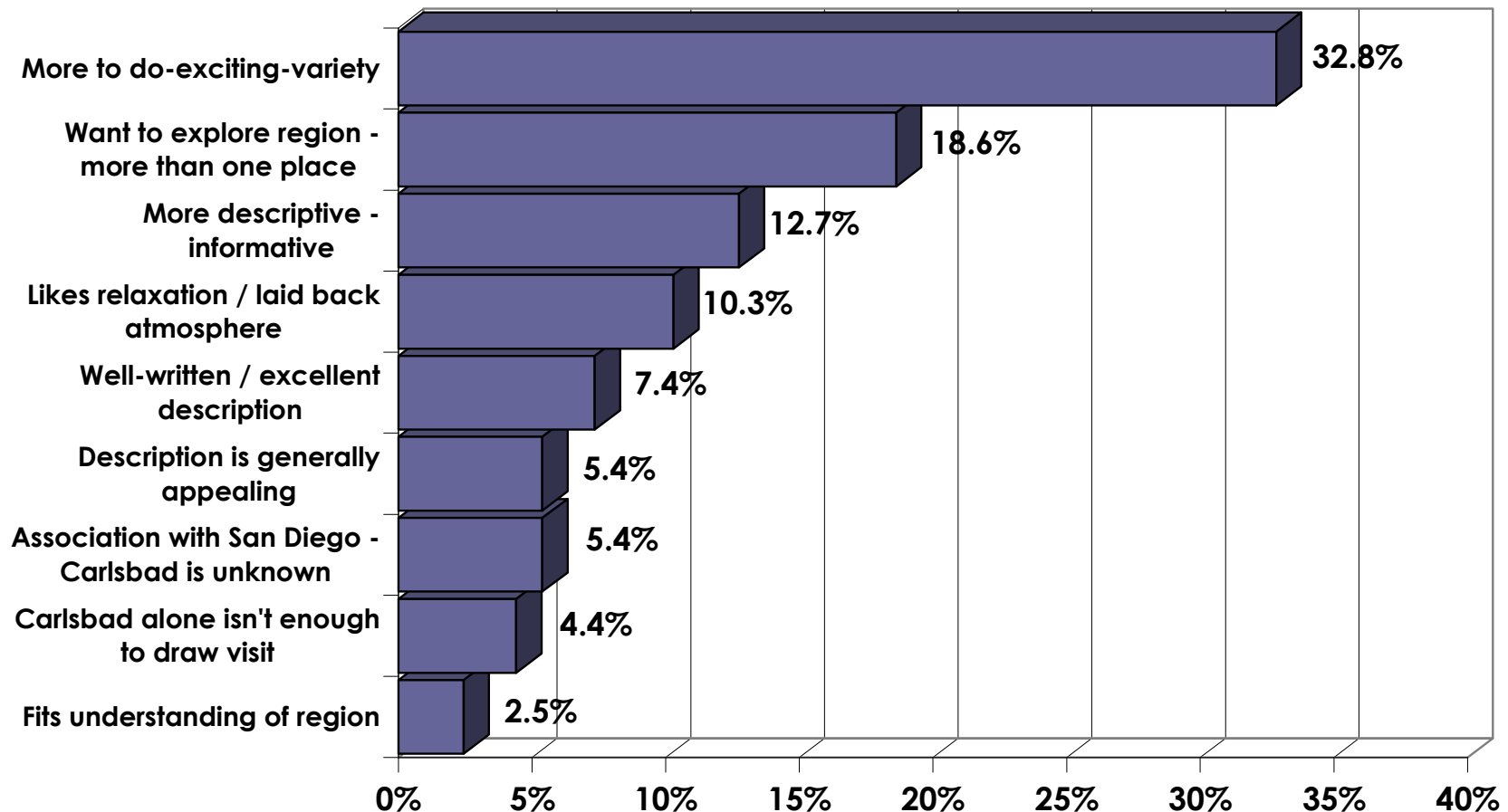


Q 23) Why do you find this description of Carlsbad more appealing than the description of the region? (Please be as descriptive as possible)



# Reason for Preference

(Prefers Discover The San Diego Beach Towns For A More Relaxed Southern California Experience)

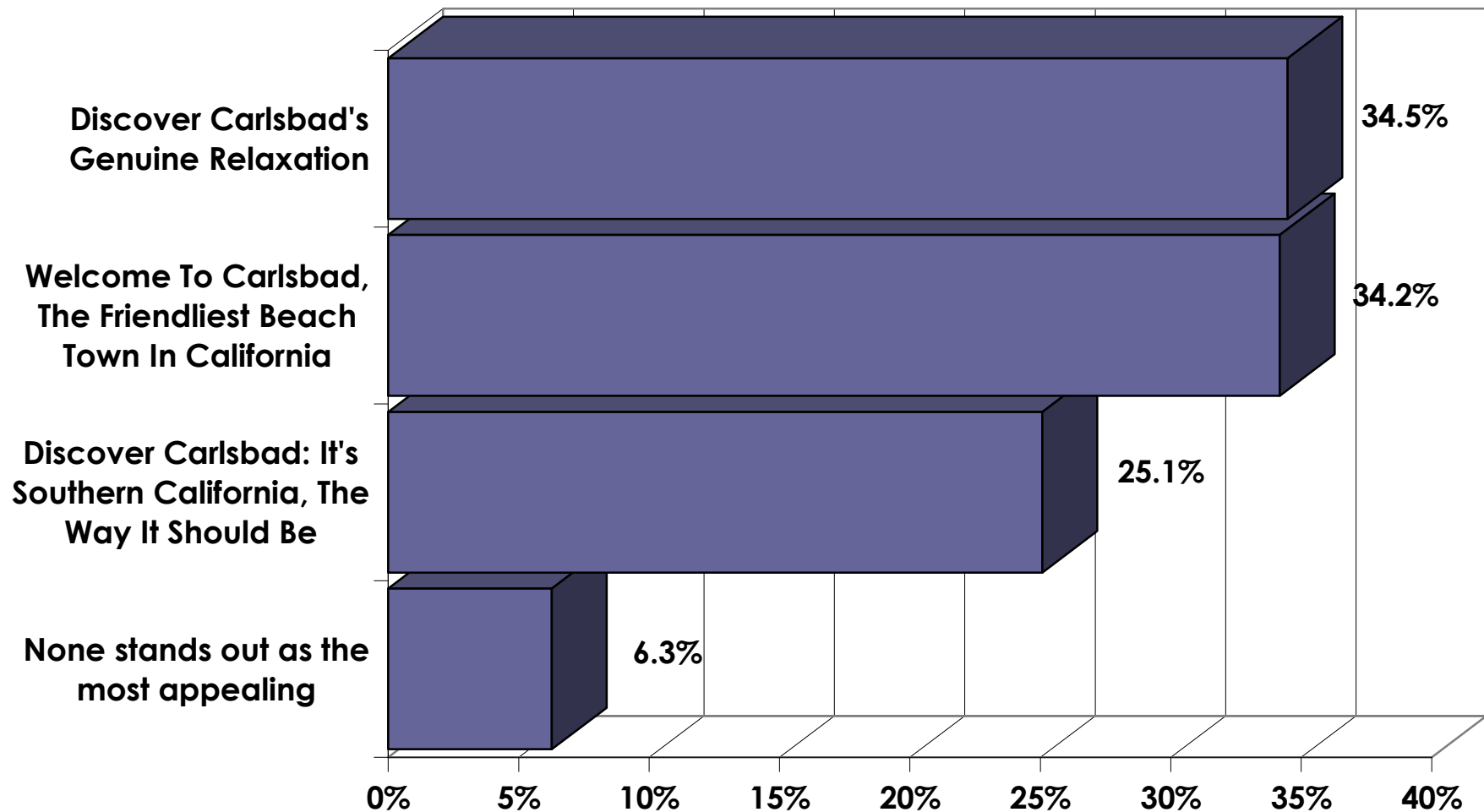


Q 24) Why do you find this description of the region more appealing than the description of Carlsbad? (Please be as descriptive as possible)

# **Review: Message was “Appealing” or “Very Appealing”**

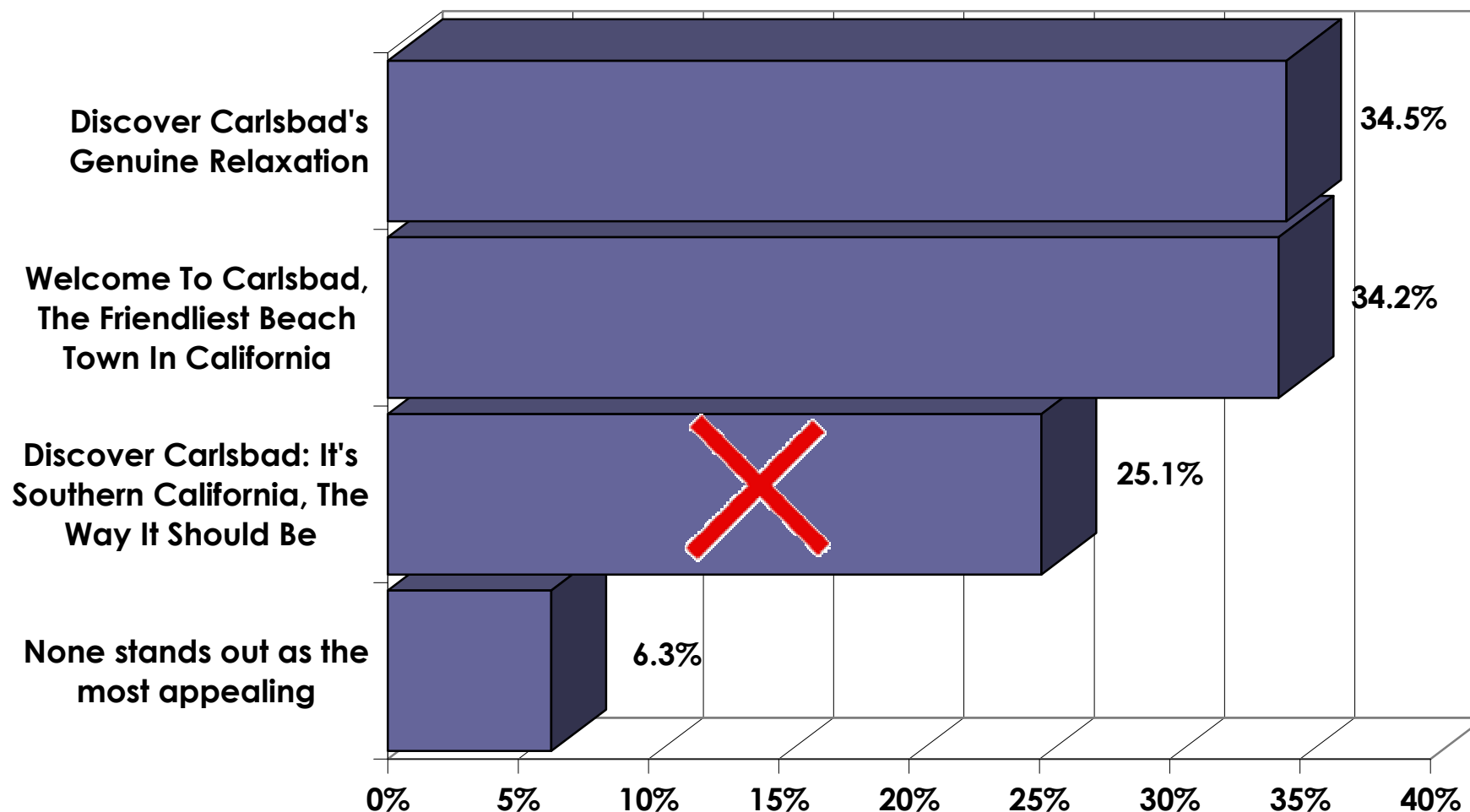
- **The Friendliest Beach Town In California: 85.9%**
- **Southern California, The Way it Should Be: 80.6%**
- **Discover Carlsbad's Genuine Relaxation: 80.1%**
- **The San Diego Beach Towns: 73.9%**

# Review: Most Appealing Messaging



Q 18) Now consider the three descriptions again. Which of these do you find the MOST APPEALING?

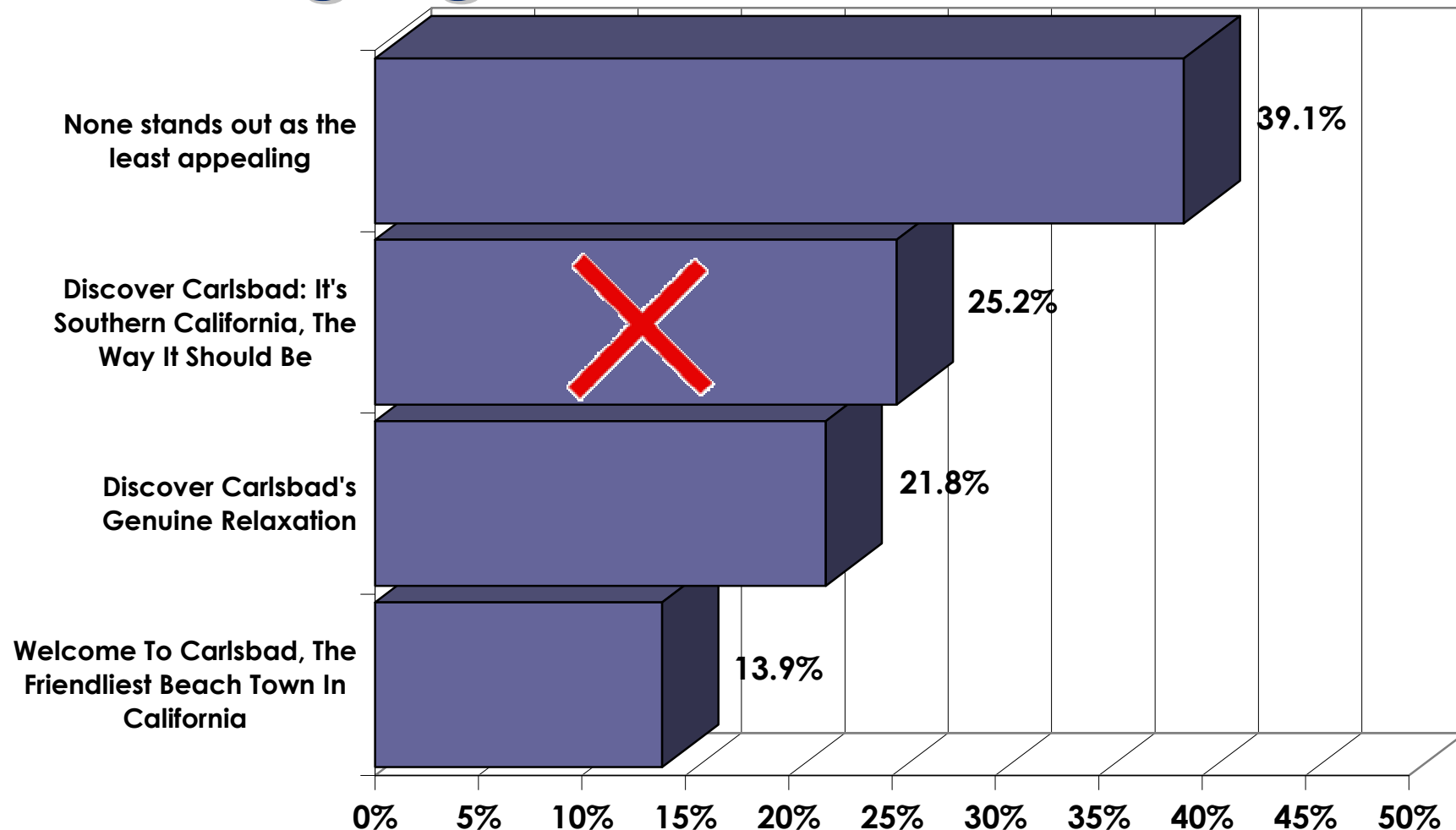
# Review: Most Appealing Messaging



Q 18) Now consider the three descriptions again. Which of these do you find the MOST APPEALING?

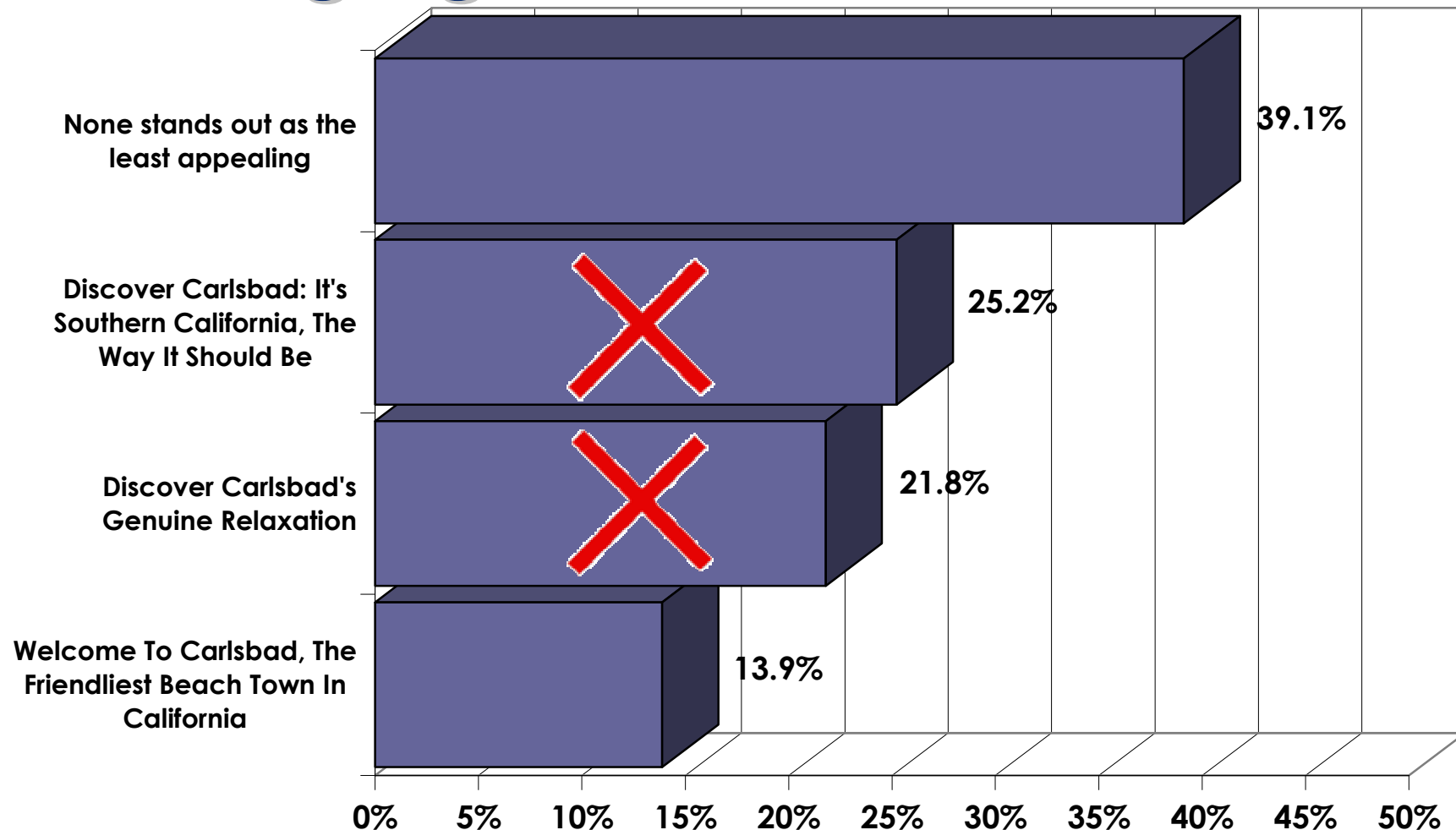
Carlsbad Positioning Exploratory

# Review: Least Appealing Messaging



Q 19) Which of these do you find the LEAST APPEALING?

# Review: Least Appealing Messaging



Q 19) Which of these do you find the LEAST APPEALING?